

To: Members of the Western Illinois University Board of Trustees  
Bill Epperly, Chair  
Roger Clawson  
Lyneir Cole  
Cathy Early  
Carolyn Ehlert Fuller  
Phil Hare  
Yvonne Savala  
D'angelo Taylor

From: Joe Rives, Vice President, Quad Cities and Planning

Date: May 30, 2013

Re: May 2013 Strategic Plan Update

This month's *Strategic Plan Update* provides a fifth draft report from the Long Term Planning Team for your review and feedback. Draft #5 emphasized members of the campus community working together to advance student success and more description of enrollment management. These changes were made in response to feedback received after Draft #4 was presented in the April 2013 *Strategic Plan Update*.

A final report will be presented at your June 7, 2013, Western Illinois University Board of Trustees meeting. The Team understands that recommendations go to the Board and the President's Leadership Team for review, and that recommendations can either be accepted, rejected, or modified by these groups.

Between now and summer retreats for the Board and President's Leadership Team, the Long Term Planning Team will develop cost estimates and list other considerations (in bullet point form) for each of the final recommendations. The Team believes this will help inform decision-making by the Board and the President's Leadership Team.

Should you have questions about the materials in this *Update*, and/or if you have feedback for the continued successful advancement of *Higher Values in Higher Education*, please contact me.

cc: President Thomas  
Provost Hawkinson  
Vice President Bainter  
Vice President Biller  
Vice President DeWees  
CSEC Pres. Rupert  
COAP President Grimm  
Faculty Council Chair Pillutla  
Faculty Senate Chair Rock  
SGA Chair Markey  
Associate Provost Neumann  
Associate Provost Parsons  
Assistant Vice President Williams  
Planning, Budget, and IR Staff  
President's Office Support Staff

(ITEMS BELOW REPRESENT DRAFT #5)

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During its Summer 2012 Retreat, the Western Illinois University Board of Trustees charged the Vice President for Quad Cities and Planning to complete an inclusive process that provides the Board and President Thomas with an analysis of critical trends and projections in higher education and recommended actions for Western Illinois University in the near-, five-, and 20-year time frames to sustain and enhance the future of the University. The Board's charge also included adapting the long-term strategic planning and thinking model discussed in an Association of Governing Board's (AGB) publication, <http://agb.org/trusteeship/2012/3/power-strategic-thinking>.

Tables 1 through 3 (at the end of this document) provide meeting schedules and membership. A 46-member Long Term Planning Team completed 13 meetings during academic year 2012-2013. To arrive at the recommendations presented in this *Report*, the Team:

- Completed discussions about the differences between strategic planning and strategic thinking.
- Analyzed *Higher Values in Higher Education* planning processes, and concluded they are sustainable, accountable, and transparent.
- Studied trends affecting public higher education. The team concluded that academic identity, collaborative partnerships, finance and infrastructure, and costs of higher education are all issues affecting public higher education now and into the next 20 years.
- Identified specific trends affecting Western Illinois University now and into the future. The team concluded that in order to maintain and enhance a sustainable future the University must address/emphasize quality, opportunity, and affordability, all of which are consistent with the Vision of *Higher Values in Higher Education*.
- Maintained currency in reading by including the perspectives of 29 articles and books, available from [http://www.wiu.edu/university\\_planning/](http://www.wiu.edu/university_planning/), in team deliberations and writing.
- Produced final recommendations, based on four Guiding Principles (discussed below) and five iterative drafts with the campus community.
- Ensured that Team recommendations advanced *Higher Values in Higher Education* goals and priorities and focused on the long-term advancement of the University.

#### Guiding Principles

In assessing trends anticipated for higher education in the next twenty years, we believe institutional sustainability is predicated on four guiding principles, reflecting the four core values of Western Illinois University. These guiding principles also place emphasis on the benefits of multiple perspectives and collaborating across all areas of the University.

- 1) The strengths of Western Illinois University are grounded in active and engaged learning through a personalized educational experience with faculty, staff and peers that leads to intellectual transformation, career opportunities, and personal growth through a lifetime of learning.
- 2) WIU achieves academic excellence through educational innovations that meet student and community needs while creating new opportunities for partnerships and growth.
- 3) WIU adapts to changing social and economic climates to meet the needs of students and community thereby increasing enrollment and student success.
- 4) The value of a WIU education is underscored by our strengths: Personal attention to our students' educational opportunities from classroom to career, affordability that does not compromise quality, social responsibility, and signature programs that meet a market need in our region.

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### Methodology

Six recommended actions are stated below. A short paragraph follows each recommended action to describe *why* each action is important to the future of Western Illinois University. Under each paragraph are the Team's recommendations. These recommendations represent *what* we believe are the necessary action steps to achieve our recommendations. We recognize and appreciate that many, if not all of these actions, require institutional teams and/or perspectives representing many different members of the campus community. Student Success is a shared responsibility of all members of the campus community. Numeric items in parentheses display consistency with the Guiding Principles of this document.

### Recommendations

- 1) **Distinguish WIU from other Illinois public and national competitor institutions.** Quality, distinctiveness, value, environment, and experience affect college selection and continuation. Therefore, we must articulate our strengths to attract students and live those strengths to support student success.
  - a) Engage in discipline-specific and university-wide discussions about the application of our strengths in academic and administrative units (1,4).
  - b) For all vice presidential areas and areas reporting to the president, identify evaluation methods used to ensure institutional effectiveness in applying our strengths (1,4). For example, in Academic Affairs, identify opportunities to increase engagement in Program Review and explore the Program Review process, including analyses of our strengths in the review process.
  - c) Invest in opportunities that make WIU nationally known for our strengths and signature programs (1,2,3,4).
  - d) Continue to build a culture of mentoring that supports personalized attention, undergraduate student success and graduation (1,3,4). Recent examples include establishment of undergraduate and graduate research days, mentoring programs on both campuses, expanded tutoring, including one-on-one tutoring, and the recent hiring of an Assistant Director of Retention and Student Success in Student Development and Orientation on the Macomb Campus.
  - e) Support high need, viable programs to meet student and regional needs (2,3) and ensure that new programs include our strengths in design and practice (1,4). For example, academic year 2012-2013 Presidential Initiatives include short- and long-term goals to establish new doctoral programs in Environmental Science, Law Enforcement and Justice Administration, and undergraduate degree in Pharmacy.
  - f) If WIU adds doctoral programs, the number of programs and number of graduates can effect the University's classification with the *Carnegie Classification of Institutions of Higher Education*. From a planning perspective, it will be important to establish a task force to maintain currency of Carnegie classification standards and study the implications of potentially transitioning from a regional institution to a national doctoral university. Whether agreed with ranking systems or not, rankings influence perceptions of institutional quality. WIU could change from a top tier national master's granting institution to a lower tier national doctoral institution if a transition is made. Therefore, we should have a strategy in place to emphasize the strengths and value of a WIU education (1,4) and an understanding of where we would place in the rankings to help define benchmarks for organizational effectiveness.
  
- 2) **Emphasize and enhance educational opportunities to decrease time-to-degree.** The strengths and value of a WIU education attract students to the University from around the world (1,4). WIU can grow enrollment by exercising innovation and by increasing educational access to opportunities other than the traditional 16-week semester and through distance education (2). Changing economic circumstances and issues of price sensitivity and elasticity may inhibit enrollment in the traditional eight, 16-week semester model (3). Traditionally students saved money during the summer to pay for fall and spring costs. It may now be that students need more time to save for college expenses.
  - a) Reinvigorate dual enrollment partnerships with local high schools.
  - b) Receive blanket approval from the Higher Learning Commission for all WIU programs to be approved as distance education programs.
  - c) Articulate which WIU programs will be actively promoted as distance programs.

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- d) Form college task forces to evaluate alternative semester lengths as well as January and May Term opportunities.
  - e) Integrate more fully into major and minor requirements (where appropriate to the discipline) new and existing service learning, student involvement and leadership experiences, experiential learning, and education abroad opportunities to make students even more competitive in the global marketplace and for advanced study.
  - f) From item e (above), identify those opportunities in which students may participate during semesters, breaks, and alternative terms.
  - g) Increase summer course offerings and related academic and student support services.
  - h) Expand educational access in the Quad Cities. Examples include expanding the enrollment target beyond 30 freshmen for fall Honors Cohorts and allowing admission of non-OAS, full- and part-time, freshmen to WIU-QC. Limiting cohort enrollment to full time freshmen who meet Western Commitment Scholarship criteria denies access to full- and part-time students eligible for enrollment and represents foregone revenue to the University.
  - i) Study the appropriateness of increasing accelerated degree programs. For example, WIU offers 18 integrated baccalaureate and master's degree programs where students can earn two degrees in as little as five years, and the accelerated degree in Recreation, Park and Tourism offered in the Quad Cities earned national best practice status by the *Wall Street Journal* and *University Business Journal*.
  - j) Participate in innovative national initiatives aimed at increasing retention and graduation rates.
  - k) Engage in strategies to meet the long-term goal of enrolling 1,000 international students at Western Illinois University.
- 3) **Form new and expanded partnerships with all levels of the educational system, business and industry, and the not for profit sectors.** The strengths of Western and commitment to advancing state, national, and professional standards in the discipline help make WIU the university of choice for students and employers (1). For example, the university-wide signature teacher education program supports teacher education and graduate education programs; links field and clinical (student teaching) experiences; and serves the needs of students, graduates, and professional communities. As noted above, changing social and economic climates lead to an increase in students who want to begin their education with WIU, but are unable to finish (3). With institutional innovation, these same students will be able to persist and graduate from WIU (2).
- a) Establish new and enhanced K-12 partnerships to increase enrollment and professional preparation. One such action will be implementation of actions to support the new Council for the Accreditation of Educational Preparation (CAEP) standard for teacher education programs to establish PreK-12 partnerships. The final standard will be released in early 2014.
  - b) Extend the Linkages (dual enrollment) model used with Black Hawk College and Eastern Iowa Community Colleges to Spoon River College and other community colleges.
  - c) Follow WIU's success in community college relations to develop articulation agreements with other four-year institutions. Examples include earning one degree at WIU and a second degree a partner institution whether through traditional timeframes or integrated degree programs; 3+1 agreements; 2+1+1 agreements, and other forms of innovation.
  - d) Implement new and innovative articulation agreements with other types of accredited institutions (e.g., foreign universities, vocational/technical institutions, and the armed services) to establish dual, integrated, and other types of articulation agreements.
  - e) Develop new partnerships between institutions that have not traditionally sent students to WIU.
  - f) Identify opportunities to provide lower division courses to degree completion (junior/senior only) institutions.
  - g) Support partnerships that prepare students for graduate education, advanced study, and employment in the global economy. Examples include internships, service learning, and field placements. As WIU continues to grow in these areas, institutional coordination will be important to make experiential opportunities available to students and to provide access to WIU interns for external businesses, agencies, and organizations.

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- 4) **Enhance enrollment planning.** There is identified institutional need for macro short- and long-term enrollment planning. This need increases as we innovate to increase enrollment (2). Organizational effectiveness will require evaluation of successes and challenges, and to take advantage of unique opportunities that promote WIU's personalized educational experience (1,4).
  - a) Designate institutional office(s) responsible for collecting departmental and college five-year enrollment targets by campus to form one institutional enrollment plan. It is important that the University have clearly defined and articulated enrollment goals for all programs, departments, and colleges at both campuses. Such actions are necessary for demand and capacity planning across the University and this includes facilities space planning.
  - b) Establish an Enrollment Management Team to work with the Deans and President's Leadership Team to define, evaluate, assess, and adjust (where appropriate) department, college, and university enrollment and retention goals. WIU has used the term enrollment management to represent shared and coordinated recruitment and retention activities. While these activities benefit from collaboration, the University needs to use enrollment management as defined in action a (above) to advance planning, transparency, and accountability.
  - c) Provide WIU's student-to-faculty ratios that support personalized attention.
  - d) Utilize student-to-faculty ratios in recruitment materials to support the distinctiveness of class sizes and engaged learning.
  - e) Centralize classroom and facility scheduling, management and planning on the Macomb Campus to best identify unit needs and areas for enhanced efficiency and improvement. WIU-Quad Cities administration successfully uses these practices at its locations.
  
- 5) **Advance fiscal planning.** Increasing revenue, decreasing expenditures, and containing costs are all essential to advancing the strengths of Western Illinois University (1,4).
  - a) Evaluate the appropriateness of differential tuition either by campus and/or program.
  - b) Position the University for the next comprehensive campaign.
  - c) Conduct cost-benefit analyses when considering renovation, replacement, or demolition.
  - d) Study opportunities for enhanced efficiencies on and between campuses.
  - e) Form a long-range bonding plan for facilities, technology, and infrastructure.
  - f) Expand public-private partnerships to help decrease institutional costs and to engage in cost savings and avoidance.
  
- 6) **Help eliminate financial barriers that prohibit college enrollment.** Together with donors and external funding agencies, WIU will exercise innovation to identify partnerships (2,3) that result in new and enhanced sources of financial assistance, so students can successfully achieve their goals through the personalized educational experience offered at Western Illinois University (1,4).
  - a) Increase need-based and merit scholarship opportunities for first year students and beyond.
  - b) Apply for new sources of institutional financial aid.
  - c) Study opportunities for increased student employment.
  - d) Apply for external funding to support experiential education.
  - e) Support focused tuition discounting to attract high achieving and diverse students.
  - f) Evaluate tuition options for summer sessions.

#### Conclusion and Next Steps

Western Illinois University is a strong institution. We have successfully served students throughout history dating back to our establishment in 1899. However, reliance on past accomplishments will not guarantee a sustainable future in a rapidly changing environment, characterized by increasing pressures for enrollment and decreasing state appropriations—trends that do not appear to be reversible in the foreseeable future.

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Therefore, institutional sustainability, prosperity, and student success will result from planning and innovation. We believe that planning should guide budgeting. WIU should continue to use *Higher Values in Higher Education*, Consolidated Annual Reports, and now this Long Term Plan to guide priority and resource allocation decisions, while recognizing that planning is dynamic and unforeseen circumstances (challenges and opportunities) may warrant attention and resources.

On the fiscal side, increasing revenue, decreasing expenditures, and engaging in cost savings and avoidance positively impacts budgets. This Plan focuses on increasing revenue by emphasizing the quality and value of a WIU education. It builds upon the successes of *Higher Values in Higher Education* since many of the actions in the strategic plan are embedded into daily operations. This is not to negate the importance of efficiencies or cost reductions, some are suggested, but similar to *Higher Values in Higher Education*, this plan should be used as a filter to inform efficiencies and cost reductions when such conversations and actions occur.

This plan also provides recommendations for future actions. Per our charge, this plan suggests *what* the University should do to sustain our future. After President Thomas and the Board of Trustees review this plan and to determine *which* recommendations should be enacted, the next step will be for University Administration to determine *who* will implement actions. Implementation should utilize intact structures and processes, task forces where appropriate, and in all cases, Western's tradition of shared governance. The Vice President for Quad Cities and Planning will provide reports on the status of the recommendations to the Western Illinois University Board of Trustees and campus community.

November 6, 2012	March 5, 2013
November 7, 2012	March 19, 2013
December 4, 2012	March 26, 2013
December 5, 2012	April 2, 2013
January 15, 2013	April 23, 2013
February 5, 2013	April 30, 2013
February 26, 2013	May 7, 2013
<u>Notes:</u> All meetings are 8:00-9:30 in Horrabin Hall Room 1 with video connection to Riverfront 205. February 26 <sup>th</sup> meeting cancelled due to WIU-Macomb closure.	

Joe Rives, Vice President, Quad Cities and Planning/Chair
Brad Bainter, Vice President, Advancement and Public Services
Ed Basch, Community Development Coordinator, City of Macomb
John Biernbaum, Associate Vice President, Student Services
Gary Biller, Vice President, Student Services
Angela Bonifas, Associate Director, Planning, Budget, and Institutional Research
Andy Borst, Director, Undergraduate Admissions
Pam Bowman, Director, Human Resources
Felix Chu, Associate Dean, University Libraries
Kathleen Clauson, Library Operations Associate/Civil Service Employees Council Representative
Billy Clow, Dean, College of Fine Arts and Communication
Scott Coker, Director, Facilities Management
Julie DeWees, Vice President, Administrative Services
Tom Erikson, Dean, College of Business and Technology)

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Table 2  
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Stephen Fraizer, Chief Information Officer  
Emily Gorlewski, Assistant Director, Center for International Studies  
Bill Griffin, Western Illinois University Board of Trustees  
Everett Hamner, Assistant Professor, English and Journalism  
Jeff Hancks, Associate Professor, University Libraries  
Teri Hare, Director University Scholarship Activities/Council of Administrative Personnel Representative  
Ken Hawkinson, Provost and Academic Vice President  
Robert Hironimus-Wendt, Associate Professor, Sociology and Anthropology  
Mike Inman, Mayor, City of Macomb  
Fred Isele, Associate Professor, Curriculum and Instruction  
Jin Jin, Assistant Professor, Chemistry  
Gregg Jorgensen, Assistant Professor, Curriculum and Instruction  
Penny Lawyer, President, Macomb Area Chamber of Commerce & Downtown Development Corporation  
Brian Locke, Associate Professor, Music/Chair, Graduate Council  
Chuck Lydeard, Chairperson, Biological Sciences  
Sue Martinelli Fernandez, Dean, College of Arts and Sciences  
Kerry McBride, Business Administrative Associate, President's Office  
Don McLean, Professor, Recreation, Park and Tourism Administration  
Kristi Mindrup, Assistant Vice President, Quad Cities and Planning  
Cayrn Morgan, Academic Advisor, College of Arts and Sciences  
Amy Mossman, Associate Professor, English and Journalism  
Mark Mossman, Chairperson, English and Journalism  
Padmaja Pillutla, Associate Professor, Accountancy and Finance/Chair, Quad Cities Faculty Council  
Steve Rock, Professor, Economics and Decision Sciences/Chair, Faculty Senate  
Mike Rodriguez, Chief Technology Security Officer/Director  
Bill Rupert, Deputy Director, Human Resources/President, Civil Service Employees Council  
Sterling Saddler, Dean, College of Education and Human Services  
Phyllis Self, Dean, University Libraries  
Rayvon Shelton, Journalism Major/Vice President Macomb Student Government Association  
Bill Thompson, Associate Professor, University Libraries  
Tammy Werner, Assistant Professor, Sociology and Anthropology  
Michael Woolever, President, Quad Cities Student Government Association

Note: To bring additional community voice and employer perspective to the table, Vice President Rives also received feedback for the Long Term Planning Team from the Quad Cities and Planning External Advisory Board. The 29-member Advisory Board meets quarterly at the Western Illinois University-Quad Cities Riverfront Campus.

Table 3  
Quad Cities and Planning External Advisory Board

Brad Bainter, Vice President, Advancement and Public Services  
Phil Banaszek, Rock Island County Board Chairman  
Matt Behrens, Regional Vice President, Iowa Health Systems  
Roger Clawson, Western Illinois University Board of Trustees/State Farm Insurance  
Chris Connolly, Assistant Branch Manager/Financial Advisor, Wells Fargo  
Derek Dyer, Manager, Materials Management, John Deere & Company  
Susan Goetz, Consultant, Mary Kay  
Mary Lagerblade, Retired, Mel Foster and Company  
Jamie Lange, Interim Director, WQPT  
Jim Lodico, President, Western Illinois University Foundation Board  
Janet Masamoto, President, JTM Concepts, Inc.

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Table 3  
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Janet Mathis, Executive Director, Renew Moline  
Steve McCann, Partner, McGladrey  
Matt Mendenhall, Vice President of Programs, Community Foundation of the Great River Bend  
Jeff Nelson, Rock Island County, General Manager, Metropolitan Mass Transit District  
Steve Nelson, Western Illinois University Foundation/Attorney, Califf & Harper  
Teresa Paper, President, Scott Community College  
Dennis Pauley, Mayor, Rock Island/Director of External Affairs, AT&T  
Colleen Rafferty, Co-Executive Director, Women's Connection  
Joe Rives, Vice President, Quad Cities and Planning  
Gary Rowe, Director, Development, Western Illinois University-Quad Cities  
Paul Rumler, Executive Vice President, Quad Cities Chamber of Commerce  
Myrian Scheibe, Vice President, Shive-Hattery  
Karla Steele, Attorney, Califf & Harper  
John Thodos, Mayor East Moline  
Bettie Truitt, Vice President for Instructional Services, Black Hawk College  
Lee Vasquez, Executive Director, Quad Cities Hispanic Chamber of Commerce  
Rory Washburn, Executive Director, Quad Cities Building Trades Council  
Don Welvaert, Mayor, Moline