

Transforming the University of Minnesota

**Final Recommendations of the
System Task Force – Coordinate Campus**

UNIVERSITY OF MINNESOTA

MORRIS

A Public Honors College

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Executive Summary

The University of Minnesota, Morris Strategic Positioning Task Force was charged by Senior Vice President Robert Jones and Chancellor Sam Schuman to identify Morris' unique contribution to the University's goal of becoming one of the top three public research universities in the world and recommend new ways to serve our students and the state while engaging in bold and visionary thinking to identify strategies that will propel us forward.

University of Minnesota, Morris Mission – Draft Version

The University of Minnesota, Morris provides an undergraduate liberal arts education of uncompromising rigor for a diverse student body. As a public honors college, UMM is committed to outstanding teaching and learning, undergraduate research, faculty scholarship, creative activity, genuine outreach, engagement and diversity. Our small, residential academic setting fosters authentic relationships, and the University serves as an educational and cultural resource for the region, nation, and world. A personalized educational experience prepares graduates to be global citizens who are interculturally competent, civically engaged, and effective stewards of their environments.

University of Minnesota, Morris Strategic Goal

To position the University of Minnesota, Morris as the best public liberal arts college in the nation, in the top tier of national liberal arts colleges, and as a public honors college.

Recommendations

After extensive input from UMM stakeholders, the Strategic Planning Task Force presents the following recommendations for becoming a public honors college and the nation's best public liberal arts college.

Ensuring the Future: Viability, Sustainability, and Visibility

The University of Minnesota, Morris is facing demographic, competitive, and financial challenges. In order to be viable and successful in reaching our strategic goal, we must restructure our academic programs, leverage our strong green campus initiatives, and reorganize the curriculum to reflect a richer international and multicultural perspective. To sustain UMM, we must:

- Achieve a student body of 2,100 by 2013, through more active coordination of and focus on recruitment and marketing, increasing scholarship funding, and improving retention.
- Provide an honors environment that includes an exceptional student experience, which begins with a culture of accomplishment, and culminates with graduation and development of active alumni. Our strategic goals include a comprehensive First Year Experience, campus-wide expectation of graduation in four years, and opportunities for all students to participate in activities to enrich academics, research, and outreach in a personally engaging community environment.
- Enhance private and nontraditional revenue by deepening our relationships with a growing pool of mature alumni and donors, achieving energy self-sufficiency through renewable energy investments, and pursuing creative sources of revenue such as expanding wind energy production and facility use during non-peak times. We must also continue to aggressively pursue state funding and acquire federal support for the Native American Tuition Waiver program.

- Institute a more rigorous system for aligning and allocating faculty and staff with University needs and student body size, develop a strong campus community, enhance recruitment and retention efforts, and provide competitive compensation for faculty and staff.
- Enhance partnerships with other institutions, organizations, and our regional community.
- Seek external funds in order to support capital projects imperative to our mission and sustainability.

In order to increase our visibility as a public honors college, we must continue to brand UMM as a public liberal arts college offering an honors experience, increase student participation and success in national scholarship competitions, improve the visibility of faculty research and creative activity, improve the visibility of undergraduate research, and increase faculty success in external scholarly awards and grants.

Doing it Right: Teaching, Research, and Outreach

Academic rigor and innovation in teaching, research, and creative activity must continue to be at the heart of our work. This requires that we improve our already selective admissions standards and continue to incorporate unique academic opportunities such as first-year seminar and senior capstone courses and undergraduate research opportunities. We must also achieve significantly higher student participation in service learning, leadership and study abroad programs and provide the required support to ensure success. We must obtain the necessary support for the hiring, retention, and development of excellent faculty and staff. Additionally, we need to maintain a strong focus on providing all students with a broad educational experience and continue our support for students who wish to pursue interdisciplinary and/or multiple majors.

Faculty scholarship and exceptional student experience are paramount to our public honors college mission. We will seek opportunities to increase faculty and staff leaves for professional development and enhance funding opportunities for and visibility of faculty research and creative activities. We will create a new scholarship program to support undergraduate research, study abroad, internships, and other enrichment opportunities. Furthermore, the campus needs to provide support to expand the Undergraduate Research Symposium and the Undergraduate Research Opportunities Program, and improve the Morris Academic Partner and Morris Student Administrative Fellowship programs.

Relationships, connections, and contributions form the core of the UMM experience. To build on these, we must increase our U.S. students of color population, actively recruit international students, expand partnerships that transfer University knowledge and resources, provide cultural partnership for the region, and meet lifelong educational goals of area residents.

Making it Happen: Organization and Operations

In order to achieve our strategic goal, UMM must provide adequate organizational support and operational structure for our campus community.

- To help faculty and staff accomplish their professional goals, we must offer increased opportunities for professional development, secure additional money to support research and creative activity, provide effective mentoring, and develop ongoing programming to enhance intercultural awareness.
- To retain and graduate outstanding students, we must offer ‘life planning’ support, promote intercultural awareness, enhance support and transition services for international students, promote activities that meet contemporary expectations of faculty, staff, and students, evaluate and improve student life services, and facilitate the integration of student involvement portfolios.

To maximize the efficiency with which we can deliver a strong set of programs, we must create an Academic Center for Enrichment, continue to rely on a proven model of shared governance, invest in the

area of strategic financial management, offer facilities and grounds comparable to top tier national liberal arts colleges, better utilize our existing facilities during non-class periods, and regularly update and implement a technology plan.

Implementation of Recommendations

To position ourselves for the future, we must provide an exceptional student experience, reach our graduation rate goals, increase student enrollment, achieve a balanced budget, provide strong support for faculty research and creative activity, and provide effective professional development for faculty and staff. To achieve these goals and deliverables, the campus should undertake the following initiatives:

- **Teaching and Outreach:** Broad integration of liberal learning outcomes and integration of green initiatives and global and multicultural perspectives into the curriculum.
- **Viability & Sustainability:** Increase scholarship funds and non-traditional revenue sources, leverage our Green Campus initiatives, and secure full funding for the Native American Student Tuition Waiver.
- **Student Initiatives:** Develop a cohesive, year-long First Year Experience, create the Academic Center for Enrichment, and strengthen student ‘life planning’ and academic support.
- **Faculty & Staff Initiatives:** Provide comparable and competitive salaries for faculty and staff and secure additional funds to support faculty scholarship and creative activity.
- **Visibility:** Develop a brand identity for the campus and implement a campus-wide integrated marketing plan to enhance our national and international recruitment.
- **Capital Plan:** Update the Campus Master Plan to align with strategic initiatives of visibility, outreach, and exceptional campus community experience.

Several of these initiatives have begun, but many still require additional resources, consultation, and planning. (See Appendix L)

Introduction and Process

Beginning in fall 2005, the University of Minnesota, Morris Strategic Positioning Task Force began the process of developing a ten-year strategic plan for our campus that would establish our direction and align us with the University of Minnesota's goal of becoming one of the top three public research universities in the world.¹

The Task Force began by identifying critical challenges facing UMM. These included a decline in student enrollment, changing demands and expectations of enrolling students, declining regional population, statewide drop in the number of high school graduates, continued cost increases, decreasing state financial support for higher education, and increased competition for high ability students.

We conducted a comprehensive review that included previous studies of UMM enrollment, the honors program, and athletics; a marketing and communications audit; the facilities master plan; the institutional data book; Admitted Student Questionnaire for UMM and peer institutions; the student satisfaction survey for UMM and the University system; the Continuing Education, Regional Programs and Summer Session Task Force Report.

The University of Minnesota, Morris Analysis and Background Data provided by Central Administration, containing demographic, student, faculty, staff, academic, technology, partnership, ranking, finance, and planning data, is located at http://www.morris.umn.edu/strategic/UMM_data_report.pdf.

To provide an ethical foundation and broad based support for the final recommendations, we engaged a broad group of internal and external stakeholders to identify our strengths and comparative advantages and establish mechanisms to leverage these to meet our challenges. Beginning with a campus-wide kickoff event in October we proceeded to host over 60 focus groups attended by over 650 campus and community members to identify core values, strengths, and key issues. Mail-in and web-based surveys supplemented this effort and were distributed to several thousand stakeholders, 210 of whom responded. Individual interviews with University of Minnesota Regents and senior administration and legislative representatives provided a broader context and perspective. Since publication of the March document, additional meetings with standing Campus Assembly committees, academic divisions, Morris Campus Student Association, and public fora have been held for broader discussion, input, and shared ownership of the plan. A website keeps the process transparent and communicated current information.²

We also researched the strategic plans and missions of peer institutions to better understand the competitive marketplace facing UMM. In our research on comparable public and private liberal arts colleges, we found ourselves to be unique, given our rural location, declining population base, part of a land grant system, and our mission as a solely undergraduate liberal arts college compared to comprehensive liberal arts colleges which have graduate programs. (See Appendix E) Research based on the Admitted Student Questionnaire highlights that two of the primary reasons students choose not to come to UMM are financial aid and competition from the U of M Twin Cities and other competitive private schools in Minnesota. (See Appendix F)

Working from the ideas generated through the focus groups and background research, the Task Force prepared a series of recommendations for UMM's future. We solicited advice from UMM senior administration and campus leaders, modified the plan, and sought input from campus and community members.

UMM Mission and Strategic Goal

As part of the broader University system, the University of Minnesota, Morris mission and goals are fully consistent with the University's mission of research and discovery, teaching and learning, and outreach and public service, as well as the strategic goal of being one of the top three public research universities in the world.

The University of Minnesota, Morris will position itself for the future by offering our students a distinctive honors experience while maintaining our core mission as a public liberal arts college. This is an affirmation of our history and our legacy of providing an outstanding educational experience for a selective group of students in the context of the public domain. The identity of a public honors college reaffirms who we are and truly reflects the student experience at UMM. The public honors college designation gives a clear and distinct message in the higher education market. Through our strategic positioning process, we will further strengthen and emphasize areas of excellence, deliver on the continuing promise of a high quality educational experience, and fulfill our mission to our region as a public institution of higher learning.

UMM Mission – Draft Version

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UMM Strategic Goal

To position the University of Minnesota, Morris as the best public liberal arts college in the nation, in the top tier of national liberal arts colleges, and as a public honors college.⁴

Recommendations

Ensuring the Future: Viability, Sustainability, and Visibility

As we move toward maturity as an institution, this strategic plan will position UMM for a great future. To do this we must ensure a viable mission and direction, maintain a sustainable financial position, build upon our image, and increase our visibility to ensure that we attract our target constituents. As a public honors college offering uncompromising rigor and a personalized education, we must seek additional state support to remain accessible to all students.

Viability and Appeal

Fundamental to UMM's viability as a world-class public liberal arts institution is maintaining the highest academic standards while continuing to provide substantial financial assistance to qualified students. (See Appendix F) As a rigorous, undergraduate institution, UMM is committed to the liberal arts tradition that educates students to think critically, prepares them to contribute in meaningful ways, and helps them to develop as interculturally competent citizens who embrace both multicultural and international perspectives. The campus recognizes the strategic importance of clearly articulating the contemporary

relevance of the liberal arts and liberal learning as essential dimensions of the baccalaureate experience in the twenty-first century. This is particularly important in the context of changing preferences of a public concerned about the costs of higher education and interested in seeing outcomes related to employment. To do this, the Task Force recommends the following:

- Restructure academic programs to better support our liberal arts focus and current strengths, as well as recognize changing demands and needs. Responsibility: Appropriate standing committees and the Chancellor and Chief Academic Officer. Timing: Review and revise within a year of installation of the new Chief Academic Officer.
- Leverage our strong green campus initiatives and partnerships to integrate environmental issues into the curriculum and campus opportunities, while becoming an energy self-sufficient campus.⁵ Responsibility: Appropriate standing committees, Chief Academic Officer, Associate Vice Chancellor for Physical Plant and Master Planning, West Central Research and Outreach Center, community partners, and others. Timing: Since 2000, these initiatives have become nationally recognized and will be aggressively pursued.
- Formally restructure the curriculum to reflect rich international and multicultural perspectives and opportunities in response to student and faculty needs, changing demographics and global expectations while reaching out to our region and community. Responsibility: Chief Academic Officer, Academic Center for Enrichment, and others. Timing: Initial steps began in 1996 and are continuing; this will accelerate in 2008 following the installation of the new Chief Academic Officer.

Sustainability

To sustain UMM, we must find the appropriate balance among student enrollment and retention, revenue enhancement, faculty and staff recruitment and retention, partnerships, and capital investments.

Student Enrollment

The majority of our current students are from Minnesota. During the past ten years, overall student enrollment has declined by 14.6 percent due to changing regional demographics, increased competition for high-ability undergraduates, increased tuition costs, flat scholarship resources, and insufficient attention to marketing, recruitment, and retention. The three most effective ways to increase student enrollment are to effectively position ourselves as a public honors college and better articulate our strengths, to increase the size and improve the quality of our first-year and transfer classes, and to improve our retention rates. The Task Force believes it is critical to both increase new student enrollment and retain and graduate students by focusing on the following objectives:

- Achieve and maintain a student body of 2,100. Students will continue to be highly qualified and increasingly diverse in their backgrounds and interests. We will increase the percentage of students from outside Minnesota from 13 to 25 percent by actively marketing the competitive advantages of our flagship liberal arts curriculum, personalized educational experience, and single tuition rate. (See Appendix G) Responsibility: Associate Vice Chancellor for Enrollment, Director of Communications, Multi-Ethnic Student Program, and appropriate standing committees. Timing: Enrollment increasing steadily over time, reaching the optimum 2,100 level by 2013.
- Meet enrollment goals while maintaining access by leveraging increased scholarship funds to attract, support, and retain high ability students. Stakeholder input emphasized maintaining access by holding tuition increases to less than six percent per year, and focus on closing the financial gap for a significantly higher percentage of low- and middle-income students.

Responsibility: Chancellor, Associate Vice Chancellor for Enrollment, Associate Vice Chancellor for External Relations, and others. Timing: Beginning fall 2006.

- Retain a significantly higher proportion of students by reducing both transfers out and dropouts. Increase first-year retention from 86 to 90 percent, and second-year retention from 77 to 85 percent. Increase the four-year graduation rate from 40 to 60 percent, the five-year rate from 56 to 75 percent, and the six year rate from 57 to 80 percent.⁶ Responsibility: Chief Academic Officer, Associate Vice Chancellor for Enrollment, Retention Work Group, Registrar, faculty advisors, and others. Timing: Ongoing.

Development and Revenue Enhancement

Much of our ability to remain sustainable depends on increasing private and nontraditional financial support for our initiatives. The Task Force recommends the following:

- Increase UMM's self-sufficiency by strengthening private philanthropic support. Increase UMM scholarship endowment contributions from \$6 to \$20 million, and UMM's overall endowment value from \$9 to \$28 million. (See Appendix H) Hiring additional staff and renovating the Community Services Building will allow us to dramatically increase the number of donors and their contribution levels. (See Appendix I) Responsibility: Chancellor, Associate Vice Chancellor for External Relations. Timing: Beginning spring 2006 with targets achieved by 2016.
- Seek additional state support to maintain access to a public honors college for all students. Responsibility: Chancellor, Associate Vice Chancellor for External Relations. Timing: Ongoing.
- Increase and strengthen relationships with potential benefactors and our increasing number of prominent and financially able alumni to leverage fiscal and non-fiscal resources. Responsibility: Associate Vice Chancellor for External Relations, Alumni Association.
- Develop sufficient capital building matching funds to meet legislative requirements for renovation and expansion projects. Continue to build legislative relationships to support capital investments. Responsibility: Chancellor, Associate Vice Chancellor for External Relations, Associate Vice Chancellor for Physical Plant and Master Planning, and others. Timing: Ongoing.
- Seek full University support for the unfunded Native American Student Tuition Waiver mandated in both the 1909 transfer of the campus grounds by Congress (Laws 1909, Chapter 184) to the state of Minnesota and in Minnesota statute establishing UMM on the site (Laws 1961, c. 312 § 1). This waiver amounts to over one million dollars in unrealized tuition revenue each year and continues to increase with improved retention and enrollment. Support University efforts to secure federal funding for the mandate. Responsibility: Chancellor. Timing: Immediate.
- Achieve energy self-sufficiency through wind generation, biomass heating and cooling, local foods initiative, green vehicles, recycling, and conservation. Invest resulting savings in strategic initiatives. Responsibility: Associate Vice Chancellor for Physical Plant and Master Planning, Senior Administrative Director for Finance and Administration, Campus Resources and Planning Committee. Timing: Initiatives have begun, additional steps beginning fall 2007.
- Aggressively pursue nontraditional revenue sources to provide scholarships, limit tuition cost increases, and enhance operating funds. These include the wind farm initiative to generate energy for resale, increased UMM summer programming, and increased facility rentals. Responsibility: Chancellor, Associate Vice Chancellor for Physical Plant and Master Planning, Senior Administrative Director for Finance and Administration, Associate Vice Chancellor for External Relations, Continuing Education and Regional Programs.

- Seek external grants to support increased levels of faculty and student research. Responsibility: Chancellor, Chief Academic Officer, Grants Development Office, Senior Administrative Director for Finance and Administration.

Faculty and Staff Recruitment, Retention, Alignment, and Diversity

To achieve our objectives, UMM must have strong and diverse faculty and staff, appropriately aligned, with a strong commitment to teaching, research, and outreach. The Task Force recommends the following:

- Institute a more rigorous system for aligning and allocating faculty and staff with University needs and student body size. On a regular basis, analyze staffing levels across all units in order to identify areas where realignment is needed, and compare UMM staffing levels in all units to those of peer institutions. Also, regularly compile and analyze class sizes and student-faculty ratios in all disciplines to ensure efficiency and effectiveness and use this data to define priorities in hiring of new faculty and staff. Continue to support small class sizes by limiting classes with 50-plus students to no more than five percent of our total course offerings.⁷ (See Appendix D) Responsibility: Chancellor, Chief Academic Officer, Senior Administrative Director for Finance and Administration, Division Chairs, Office of Human Resources, in consultation with Campus Resources and Planning Committee. Timing: Ongoing, began fall 2006.
- Develop a strong faculty community, as recommended by focus groups, by maintaining at least 85 percent tenure track positions. Retain personnel and enhance faculty and staff community by developing and supporting formal mentorship and professional development programs for all personnel. Responsibility: Chief Academic Officer, Division Chairs, Directors, Office of Human Resources. Timing: Ongoing.
- Intentionally attract diverse faculty and staff who enrich our campus and regional community. This supports University goals of intercultural competence. Responsibility: Chief Academic Officer, Division Chairs, Directors
- Enhance our recruitment efforts by creatively addressing consideration of joint appointments, spousal and partner needs, employee and family educational support, and transitions. Responsibility: Chief Academic Officer, Division Chairs, Directors, Office of Human Resources. Timing: Begin within a year of installation of the new Chief Academic Officer.
- Provide faculty and staff salaries comparable to the upper tier of the Morris 14 Comparison Group in order to reach our goal of becoming a top tier national liberal arts college. (See University of Minnesota, Morris Analysis and Background Data and Appendix J) Responsibility: Chancellor, Chief Academic Officer, Campus Resources and Planning Committee, Office of Human Resources, Faculty Affairs Committee. Timing: Beginning fall 2006.

Partnerships

Enhance academic, research, and community synergies through regional, national, and international partnerships. Continuing Education and Regional Programs, the Center for Small Towns, and other campus units will play a major role in forging these partnerships to serve the campus and regional communities. (See Appendix K) The Task Force recommends the following:

- Leverage regional and international academic partnerships that provide opportunities for program enhancement and continued commitment to meeting our mission. Strengthening relationships with other universities such as those in China, South Korea, Japan, and others around the world, as well as campuses of the University of Minnesota, will serve to sustain UMM and continue to foster an academic honors community. Responsibility: Chancellor, Chief

Academic Officer, Associate Vice Chancellor for Enrollment, Center for International Programs. Timing: Ongoing.

- Enhance existing research partnerships with federal, state, and University efforts like the West Central Research and Outreach Center while building our international research opportunities in the developing world and elsewhere. This will strengthen our commitment to undergraduate research, faculty scholarship and creative activity. Responsibility: Chief Academic Officer, Grants Development Office. Timing: Ongoing.
- Meet the needs of our community by developing partnerships with regional organizations like the Community Outreach Partnership Center Program and other University campuses and programs like the University of Minnesota's Office of Public Engagement. This will ensure access to educational opportunities for all University stakeholders and meet our obligations to incorporate engagement and outreach into research, teaching, and learning. Responsibility: Chief Academic Officer, Continuing Education and Regional Programs, Academic Center for Enrichment. Timing: Ongoing.

Capital Investments

Sufficient capital investments are essential for UMM to support academic and research requirements and meet student and community expectations. The Task Force recommends the following:

- Update and modernize residential life facilities to meet student expectations and needs. Responsibilities: Vice Chancellor for Student Affairs, Associate Vice Chancellor for Physical Plant and Master Planning, Office of Residential Life.
- Locate units whose primary interaction is with external audiences in a renovated Community Services Building. This will improve the efficiency and visibility of admissions and external relations by creating an attractive and welcoming entrance to campus. This enhancement will help us achieve our goal of increasing student enrollment and fund development. Responsibility: Chancellor, Associate Vice Chancellor for Physical Plant and Master Planning, Associate Vice Chancellor for External Relations, Associate Vice Chancellor for Enrollment.
- Renovate and modernize the Food Service Building to improve preparation and serving facilities to offer a greater variety of fresh, healthy, locally provided food of improved quality that is attractive to a more diverse student body. This was strongly recommended by the focus groups. Responsibility: Vice Chancellor for Student Affairs, Associate Vice Chancellor for Physical Plant and Master Planning, Senior Administrative Director for Finance and Administration.
- Renovate Briggs Library to enhance library services, provide more space for group collaboration, solitary study, expanding collections, special events and technological demands. This will support our goal of being a top tier national liberal arts college by providing the academic support for student and faculty instruction and research. Insurance carriers are citing this building for significant potential health and safety liability issues. Responsibility: Chancellor, Chief Academic Officer, Associate Vice Chancellor for Physical Plant and Master Planning, Associate Vice Chancellor for External Relations, Director of Rodney A. Briggs Library.
- Support the commitment to be a regional cultural center by completing the Humanities/Fine Arts complex. The project was repeatedly highlighted by campus and community focus groups. Responsibility: Chancellor, Associate Vice Chancellor for External Relations, Associate Vice Chancellor for Physical Plant and Master Planning.
- Update the Campus Master Plan to propose a prioritized timetable for renovation of all instructional space, offices, and other facilities. The Campus Master Plan should include a plan

for future technology and utility upgrades. Responsibility: Chancellor, Associate Vice Chancellor for Physical Plant and Master Planning, Campus Resource and Planning Committee, Director of Computing Services, Director of Media Services.

Visibility

For our excellence to be recognized through higher enrollment, increased donations, and continued strong public funding, UMM must significantly improve our image and visibility. The Task Force recommends the following:

- Brand UMM as a top-tier, nationally recognized, public honors liberal arts college with uncompromising academic rigor in order to increase enrollment and financial support. Responsibilities: Associate Vice Chancellor for External Relations, Director of Communications. Timing: Immediate.
- Increase levels of student participation and success in national scholarships, and promote these in multiple venues.⁸ Responsibility: Chief Academic Officer, Associate Vice Chancellor for External Relations. Timing: Expanded efforts with creation of Academic Center for Enrichment.
- Increase publicity for faculty and student research efforts and successes. Visibility of faculty scholarship, creative activity, and student research should be enhanced with greater publicity and the addition of a digital institutional repository which will aid in national recognition. Responsibility: Chief Academic Officer, Associate Vice Chancellor for External Relations. Timing: Immediate.
- Increase levels of faculty participation and success in external scholarly awards, honors, and grants. Promote these in multiple venues and provide sufficient institutional support. Responsibility: Chief Academic Officer, Associate Vice Chancellor for External Relations. Timing: Ongoing.
- Enhance summer and break programs to attract regional, national, and international groups and events that will build UMM's image as a leader in a variety of arenas. This will better serve our community and increase efficiency of facility use. Responsibility: Continuing Education and Regional Programs, Senior Administrative Director for Finance and Administration, Office of Residential Life, Regional Fitness Center. Timing: Ongoing.

Doing it Right: Teaching, Research, Outreach

To become the best public liberal arts college in the nation and remain consistent with the University's mission, we are committed to our focus on teaching, research, and outreach.

Academic Rigor and Innovation

The heart of UMM's work is our dedication to academic rigor and innovation. The Task Force recommends the following:

- Improve the student academic profile while expanding the range of measures to evaluate student likelihood of success. Retain selective admissions standards, admitting students in the top quarter of their graduating class with average ACT scores of at least 25, and students who reflect focus group priorities of diverse backgrounds and interests that contribute positively to the campus community. Responsibility: Chancellor, Associate Vice Chancellor for Enrollment, Scholastic Committee. Timing: Immediate.
- Create an Academic Center for Enrichment. This will build on our core values – a rigorous residential undergraduate education providing many enriching opportunities to our students,

which include superior student and faculty interaction and a high level of undergraduate research activity. The Academic Center would provide enhanced opportunities for visibility, participation, and program collaboration. It would oversee Undergraduate Research Opportunities Program, study abroad, National Student Exchange, support of national scholarship competitions, Undergraduate Research Symposium, Morris Academic Partners and Morris Student Administrative Fellows programs, Honors Program, civic engagement and outreach. It would serve as a resource to encourage students and faculty to initiate and engage in research and other academic enhancements. This initiative would require a recurring strategic investment for administrative programs and support to enrich and expand these programs to reach UMM's goal of being a top tier national liberal arts college. Responsibility: Chief Academic Officer. Timing: Immediate.

- Expect that all UMM students participate in first year and senior capstone seminars, as well as achieve higher participation in service learning and leadership experiences.⁹ Our successful service learning program, which has a fifty percent student participation rate, is grant funded until 2007, and must have institutional support if we want to reach our goal of increased student participation. Further development and curricular integration of these innovative and rigorous components will ensure fulfillment of our responsibility to incorporate teaching, learning, and civic engagement in UMM's honors experience. This approach ensures a unique academic experience for all students regardless of their academic priorities and financial abilities. Responsibility: Chief Academic Officer, Vice Chancellor for Student Affairs. Timing: The service learning program is currently grant funded and will require institutional support beginning fiscal year 2008. Other academic, service, and leadership elements should be developed and evaluated continually.
- Provide opportunities for all students to study abroad which prepares them to be global citizens. Make this central to the curriculum by creating and supporting a new initiative providing mini grants to help defray student study abroad costs. This also boosts our ability to recruit students with increasingly demanding expectations of their undergraduate experience.¹³ Responsibility: Chancellor, Chief Academic Officer, Center for International Programs, appropriate standing committees. Timing: Ongoing, with goal to be achieved by 2008.
- Sustain high teaching quality by hiring and supporting faculty with outstanding credentials and terminal degrees, improving our tenure review process, supporting new faculty to improve their teaching skills, and providing them with effective mentoring. This supports our commitment to being a nationally recognized public honors college. Responsibility: Chief Academic Officer, Division Chairs. Timing: Continual goals to be further implemented with installation of the new Chief Academic Officer.
- Enhance the academic curriculum of all majors by regularly evaluating all coursework to include effective written and oral communication skills across the discipline and encourage every discipline to promote service learning, study abroad programs and undergraduate research. Integrate sustainability principles, multicultural and international perspectives across the curriculum. This will help to better prepare students and strengthen our mission as a public honors college. Responsibility: Chief Academic Officer, Division Chairs, Curriculum and appropriate standing committees. Timing: Ongoing.
- Continue and enhance opportunities for all students to receive maximum benefit from UMM by continuing to support interdisciplinary students and those who pursue multiple majors and/or minors. This will support our role as a public honors college and help fulfill our mission of graduating students with a broad academic background and the potential for pursuing advanced studies in any field. Responsibility: Chief Academic Officer, Academic Advising, Registrar. Timing: Ongoing.

- Create a new scholarship initiative to provide new enrichment opportunities for outstanding UMM students who show significant potential. This supports our efforts to recruit and retain high ability students and to meet the research goals of the University. Additional resources will be required for this program. Responsibility: Chief Academic Officer. Timing: Groundwork to start in fall 2006 with expansion to follow.
- Provide sufficient institutional support to expand and improve the Undergraduate Research Symposium and other opportunities for students to present their research.¹⁰ This increases research depth and highlights the success of our students. Promote giving to the Bos and Tate travel funds. Responsibility: Chief Academic Officer, Undergraduate Research Symposium Committee. Timing: Groundwork to start in fall 2006 with expansion to follow.
- Improve the Morris Academic Partnership and Morris Student Administrative Fellows programs that provide students with opportunities to partner with faculty on research.¹¹ This supports faculty scholarship and student research experiences in line with the University's strategic goal, and better prepares students for graduate-level research. Responsibility: Chief Academic Officer. Timing: Continual goals to be further expanded with the installation of the new Chief Academic Officer.
- Seek additional support for the Undergraduate Research Opportunities Program in order to expand these enriching and demanding opportunities for students and faculty. Responsibility: Chancellor, Chief Academic Officer. Timing: Immediate.
- Provide sufficient institutional funding and infrastructure to assist and expand research and creative activity. Enhanced library and information technology resources support vigorous and innovative undergraduate research, capstone seminars, course work, writing initiatives and information literacy skills. Responsibility: Chief Academic Officer, Director of Briggs Library, Director of Computing Services, Director of Media Services.

Faculty Scholarship and Creative Activity

Faculty scholarship and creative activity is essential to UMM's mission. If UMM is to position itself in the top tier of national liberal arts college, we must better support these efforts. The Task Force recommends the following:

- Provide institutional funding – such as internal grants, seed money, summer stipends and infrastructure – comparable to top tier liberal arts institutions, in order to assist and expand faculty scholarship and creative activity.¹² Responsibilities: Chief Academic Officer, Grants Development, Division Chairs. Timing: Continual goals to be further implemented with the installation of the new Chief Academic Officer.
- Improve opportunities for and increase participation in single semester and sabbatical leaves to support faculty scholarship and creative activity.¹² Responsibilities: Chief Academic Officer, Division Chairs. Timing: Continual goals to be further implemented with the installation of the new Chief Academic Officer.
- Increase recognition and visibility of faculty scholarship and creative activity, both on and off campus, by expanding travel support and providing opportunities for collaborative work. Responsibilities: Chief Academic Officer, Division Chairs. Timing: Continual goals to be further implemented with the installation of the new Chief Academic Officer.

Outreach: Relationships, Connections, and Contributions

Building relationships and connections helps prepare our students to contribute in meaningful ways by being interculturally competent, socially responsible, and effective stewards of their environments. These

form the core of what makes the UMM experience exceptional both on campus and in the broader community. The Task Force recommends the following:

- Increase U.S. students of color from 15 to 25 percent of total enrollment. UMM has a long tradition of attracting diverse students, faculty, and staff, who enrich our campus and regional community in countless ways. This supports UMM and University goals and commitments to diversity and intercultural competence. Responsibility: Associate Vice Chancellor for Enrollment and Multi-Ethnic Student Program, in consultation with appropriate committees. Timing: Ongoing, with goal to be achieved by 2016.
- Actively recruit more international students and visiting faculty who will enrich campus life, help create a sense of an international campus, and improve the intercultural competence of the campus and broader community. Appropriately support recruitment efforts, academic performance, and transition to reach our campus goal of five percent international students. Responsibility: Chief Academic Officer, Associate Vice Chancellor for Enrollment, Center for International Programs, appropriate standing committees. Timing: Ongoing, with goal to be achieved by 2016.
- Integrate civic engagement, a strength of our campus community, and needs to be further integrated into our teaching, learning, and research responsibilities through opportunities for students and faculty to serve the local, national or global community. Expand institutional support for partnerships that transfer university knowledge and resources to support the public and private sectors, enrich our mission, and contribute to the public good through formalized civic engagement and service learning and informal community service and volunteerism. Responsibility: Vice Chancellor for Student Affairs, Chief Academic Officer, Center for Small Towns, University of Minnesota Associate Vice President for Public Engagement. Timing: Beginning fall 2006.
- Explore opportunities for partnerships, development opportunities, and expanded programming for a cultural center for west central Minnesota. To best serve our region and honors college mission, top tier creative and performing arts events and facilities should be available at UMM. Responsibility: Chief Academic Officer, Vice Chancellor for Student Affairs, Associate Vice Chancellor for External Relations, Associate Vice Chancellor for Physical Plant and Master Planning, and appropriate standing committees. Timing: Development to begin immediately with capital project in 2010 bonding.
- Provide opportunities to meet the current and lifelong educational goals of area residents, high school students, and other stakeholders. Continuing Education and Regional Programs will actively work to develop programs to meet these needs.¹⁴ Responsibility: Chief Academic Officer, Director of Continuing Education and Regional Programs. Timing: Ongoing.
- Enhance our direct engagement with the community of west central Minnesota by providing outreach to benefit the public and private sectors through our Center for Small Towns.¹⁵ This will provide our students, faculty and staff the opportunity to actively collaborate with the community and build experiences to prepare them for ongoing success. Responsibility: Director of Center for Small Towns. Timing: Ongoing.
- Collaborate for the benefit of area residents through academic support and mentoring relationships provided by UMM students to PK-12 students. This will support the University's mission of engaging in support of PK-12 education and provide a broader experience for UMM students. Responsibility: Chief Academic Officer, Vice Chancellor for Student Affairs. Timing: Ongoing.

Making it Happen: Organization and Operations

Strong organizational and operational support is required to ensure success of the strategic goals and initiatives outlined in this document.

Organization

Organizational support provides faculty, staff, and students with the administrative infrastructure necessary to meet UMM's mission and strategic goal.

Faculty and Staff Support

To help faculty and staff accomplish their professional goals while advancing UMM's mission, it is necessary to provide adequate resources, programming, and encouragement. The Task Force recommends the following:

- Promote intercultural awareness, respect, and appreciation throughout the campus community. Highlight the importance of this effort and provide faculty and staff with incentives to participate in learning opportunities and actively practice their skills. This will improve the climate both on campus and in the community, help achieve both the University's and UMM's missions, improve student campus life, and increase faculty, staff, and student retention. Responsibility: Chief Academic Officer, Vice Chancellor for Student Affairs, Division Chairs, Directors, Office of Human Resources. Timing: Immediate.
- Offer in-depth opportunities for professional development in order to ensure that personnel are able to exert leadership in their areas of expertise, deliver strong research programs, and become better teachers and service providers. Reallocate internal funds to support this effort. Responsibility: Chief Academic Officer, Division Chairs, Directors, Office of Human Resources. Timing: Ongoing.
- Provide effective mentoring, guidance, peer support, and opportunities for faculty and staff to advance within UMM's employment system. Focus particularly on new employees, but also offer ongoing assistance to improve performance and enhance opportunities for all employees. This promotes good morale, increases productivity, and improves retention of high-performing personnel. Responsibility: Chief Academic Officer, Division Chairs, Directors, Office of Human Resources. Timing: Ongoing.

Student Support

In order for UMM to retain and graduate outstanding students, we must ensure that they are represented in our campus shared governance structure, acclimated to our rural campus setting, and comfortable with campus life, social atmosphere, and intercultural competencies. To continue to lead the University system in student satisfaction ratings, the Task Force recommends the following:

- Offer 'life planning' support to students entering college who have limited recognition of the relevance of a liberal arts education, including top quality academic counseling such as *The Deciding Project*¹⁶, career guidance, internships, mentoring programs, alumni networking, campus community building programs, and other resources. This will improve student retention, satisfaction, graduation rates, and future success. Responsibility: Chief Academic Officer, Vice Chancellor for Student Affairs. Timing: Ongoing, with expansion to begin fall 2006.
- Promote intercultural awareness, respect, and appreciation throughout the campus community. As a campus, assess, design, and implement an inclusive, contemporary multicultural campus life structure and lead campus-wide strategies to advance participation as a multicultural leader, like those offered by the Multicultural Student Leadership Retreat.¹⁷ Actively advance efforts to

equip graduates for lives of leadership and service in a diverse, global society. This will improve the climate both on campus and in the community, help achieve our mission, enhance campus life, and increase student retention. Responsibility: Vice Chancellor for Student Affairs. Timing: To begin fall 2006.

- Develop campus and community partnerships to meet the needs of students, faculty, and staff from communities underrepresented in west central Minnesota. Address needs from travel to personal care products and services to provide a respectful and comfortable environment that fosters diversity. Responsibility: Vice Chancellor for Student Affairs. Timing: To begin fall 2006.
- Enhance academic support and environmental transition services for international students. These will improve the experience of all students, faculty, and staff by ensuring opportunities for success to a diverse student body. A supportive infrastructure, requiring additional staff, will be necessary to best serve an increasing international student population. Responsibility: Vice Chancellor for Student Affairs, Chief Academic Officer. Timing: To begin fall 2006.
- Promote activities on campus and in the community that meet the expectations of contemporary students. As mentioned extensively in focus group discussions, given our location, the campus community requires more weekend activity variety for students. This will help to enrich student life and preserve a close campus community while meeting our student retention and graduation goals. Responsibility: Vice Chancellor for Student Affairs. Timing: To begin fall 2006.
- Evaluate and improve effectiveness and modernity of student life services including housing, health care, transportation, and dining. These programs are integral to undergraduate life at UMM and need to continue to improve support for all students. This will help to better serve international and out-of-state students as well as improve the campus experience while meeting matriculation, retention, and graduation goals. Responsibility: Vice Chancellor for Student Affairs. Timing: To begin fall 2006.
- Improve student credentials upon graduation by offering a student involvement portfolio to support students' out-of-class experience. Recording leadership activities as well as academic, media, social, political, arts, athletic, cultural, religious, governing, service, and honorary activities could be used in conjunction with academic transcripts, resumes, and career portfolios to provide prospective employers with a multi-faceted record of student accomplishments. This will serve to better equip UMM graduates with the tools needed for success, while creating a measure for accomplishing our multi-faceted mission. Responsibility: Vice Chancellor for Student Affairs, Registrar. Timing: To begin 2007.

Commitment to Diversity

The campus commitment to educating a diverse student body and building a respectful inclusive culture is rooted in the public liberal arts college mission articulated in the 1960s and in the campus history as an American Indian Boarding School (established in the 1890s). Diversity (including but not limited to GLBT, individuals with disabilities, international, veterans, racial and multi-ethnic, and spirituality) in students, faculty and staff is an important commitment for the University. To maintain and strengthen this commitment, we have interwoven strategies and goals within this document.

Over the past decade, UMM has expanded efforts to build an inclusive respectful campus community in partnership with the Anti-Defamation League's *A World of Difference Institute*, established an annual Multicultural Student Leadership Retreat and created the Diversity Community Outreach Program.

Our future will build on this strong foundation to sustain a position of leadership in Minnesota's higher education while educating a diverse student population for intercultural competence and leadership in a global community. The task force recommends the following:

- Affirm a campus mission statement that more specifically articulates our commitment to diversity in a small, rural residential academic setting.
- Endorse the idea that bridging academic and student life is necessary to build a truly inclusive campus that educates interculturally competent graduates.
- Operationalize our goal to increase US students of color from 15 to 25% of total enrollment.
- Expand campus and community efforts to meet student needs and provide a respectful and comfortable environment that fosters diversity.
- Adopt and fully implement a plan to promote intercultural awareness, respect, and appreciation throughout the campus community, including professional development for faculty and staff.
- Assess, design and implement an inclusive, contemporary multicultural campus life structure and lead campus-wide strategies to advance participation as a multicultural leader.

Operations and Structure

In order to maximize the efficiency with which we can deliver a strong set of programs, we continue to rely on a proven model of shared governance¹⁸ that enhances our academic curriculum, provides comfortable facilities, and ensures financial stability, the Task Force recommends the following:

- Given the increasing complexity of budgets in higher education, the need to strategically reallocate resources in key areas, and seek new sources of revenue, UMM needs to invest resources in the area of strategic and analytical management of financial resource allocation across campus. Responsibility: Chancellor. Timing: Ongoing.
- As we seek to become a top tier national liberal arts college, we must offer facilities that are comparable to our peers. We must have a well-maintained, safe, and accessible physical plant, an aesthetically appealing campus landscape, and create a physical UMM identity. Several of our buildings are in need of renovation and modernization including Briggs Library, Multi-Ethnic Resource Center, Education building, Camden Hall, Humanities building, and Residential Life facilities. We must revitalize our Campus Master Plan to encompass appropriate expansion of academic and service buildings. Responsibility: Chancellor, Associate Vice Chancellor for Physical Plant and Master Planning, Campus Resources and Planning Committee.
- To enhance our financial resources, we must better utilize our existing facilities during the summer and breaks. The future renovation of Blakely Hall will allow for the use of our existing facilities for non-credit residential programming to off campus constituents. Also, garnering non-residential programs such as marching band practices, sports camps, and Regional Fitness Center programming would capitalize on many of our strengths. Responsibility: Chief Academic Officer, Vice Chancellor for Student Affairs, Associate Vice Chancellor for Physical Plant and Master Planning, and collaboration between academic programs, student life, and athletic departments.
- Support the entire educational enterprise by regularly analyzing and updating a technology plan to ensure efficient and effective use of campus resources consistent with our mission to be a top tier national liberal arts college. Responsibility: Chief Academic Officer, Associate Vice Chancellor for Physical Plant and Master Planning, in consultation with appropriate directors and the Morris Campus Student Association.

Implementation of Recommendations

In order to position ourselves for the future, we must provide an exceptional student experience, reach our graduation rate goals, increase student enrollment and maintain a balanced budget. To achieve these goals and deliverables, the campus should undertake the initiatives outlined below, developed through an extensive and open campus process. Decisions regarding administrative responsibilities for implementation will be made by the Chancellor, with ongoing input from the Strategic Positioning Task Force and relevant campus committees and constituents.

Teaching & Outreach Initiatives			
Initiatives	Timeline	Consultation	Measurement
Integrate green initiatives into curriculum through interdisciplinary activity	Planning to begin Spring 2007	Curriculum Comm., Campus Resources & Planning Comm. (CRPC), West Central Research & Outreach Center (WCROC)	Increased campus recognition from external rating organizations and through broad integration into curriculum
Broad integration of liberal learning outcomes just as writing, speaking, and critical thinking	Planning to begin Spring 2007	Curriculum, Disciplines, Scholastic, First Year Seminar (FYS)	Improved NSSE results and graduate exit survey results
Improve participation in and documentation of civic engagement, public service, and leadership	Plan to be developed Fall 2007	Curriculum, Disciplines, Student Affairs, FYS	Increased participation, Improved NSSE results and graduate exit survey results
Integration of current global perspectives across curriculum	Part started (Bush Grant), Develop plan for Fall 2007	Curriculum, CRPC, Scholastic Comm., IPC, DSAAG	Integration into curriculum, improved NSSE results and graduate exit survey results

Faculty & Staff Initiatives

Initiatives	Timeline	Consultation	Measurement
Increase support, recognition and visibility of Faculty Scholarship	Continual implementation	Faculty Center, Faculty Affairs & Consultative Committee	Number of external grants received, number of national presentations supported and number of publications, exhibitions, and performances
Develop professional development and mentoring opportunities	Ongoing	Division Chairs, Administrative Committee	Retention of faculty and staff, attendance at conferences, hosting relevant campus workshops and meetings
Provide comparable salaries for faculty and staff	Beginning Fall 2006	CRPC, Faculty Affairs, Consultative, USA	Increase standing on salary listing in Minnesota
Develop and implement a campus-wide technology plan	Beginning Spring 2007	Appropriate directors, MCSA, CRPC	Secure ongoing funds to improve and maintain our technology advantage

Student Initiatives			
Initiatives	Timeline	Consultation	Measurement
Develop cohesive year-long “First Year Experience”	Begin Discussions Fall 2006 (Reestablishment of the FYE Subcommittee)	Scholastic, Curriculum, FYS, Residential Life, Student Services	Increased retention, improved experience, improved graduation rate
Integrated Multi-cultural Campus Life and Interculturally competent graduates	Fall 2007	Faculty Development, Multi-Ethnic Experience, Student Services, IPC, etc.	Increase recruitment and retention of traditionally underserved students, improve student satisfaction survey results for this group
Create academic enrichment office	Task Force formed Fall 2006	CRPC, Scholastic, Curriculum, Consultative, Honors Program, CIP, etc.	Increased awareness (internally and externally) and success in research, study abroad, etc.
Strengthen “life planning” student support	Discussions begin immediately	Student Services, Scholastic, Retention Work Group, External Relations and Alumni Office	Increased satisfaction in life planning area of the graduate exit survey, Increased % of students using alumni career networks

Viability & Sustainability

Initiatives	Timeline	Consultation	Measurement
Create a scholarship program for additional merit scholarship funds and enrichment opportunities	Beginning Fall 2006	CRPC, Retention Work Group, SAP	Increase percentage of high ability students enrolled and graduated, endowed funds to support these scholarships
Increase non-traditional revenue – private donors, facility use, grants, wind energy funds, etc.	Ongoing	CRPC, CERP, Student Affairs, Administrative Committee, Student Services, Consultative, Physical Plant	Increased percentage of total budget supported from these sources
Develop additional green energy initiatives and integrate into master plan	Ongoing	CRPC	Increased energy self-sufficiency, increased research opportunities
Secure full funding for Native American Tuition Waiver	Fall 2007	CRPC, Enrollment Area, American Indian Advisory Committee, MSP, CERP	Ongoing secured funds to cover tuition to improve graduation rates of Native American students

Visibility Initiatives

Initiatives	Timeline	Consultation	Measurement
Brand development - market research, e.g. honors college, honors experience	Immediately begin research and plan	CRPC, Curriculum, External Relations, IMG, CCG	External recognition and understanding of brand
Recruit and retain national and International students	Immediately	CRPC, Scholastic, Retention Work Group, IPC,	Increased numbers of students and graduates from these markets, track cohorts
Implement campus-wide integrated marketing plan	Immediately following market research	CRPC, IMG, CCG, Athletics, Student Affairs	External recognition and understanding of UMM experience
Update Campus Master Plan to align with strategic initiatives	Fall 2007	CRPC, Divisions, ASSC	Better understanding of use and renovation of physical facilities, increased pride in campus facilities

Capital Plan			
Initiatives	Timeline	Consultation	Measurement
Gateway to Campus: Community Services Building	2008 Capital Request	CRPC	Inclusion in U of M Capital Request, lobby efforts, secure funds
Residential Facility and Conference Center: Blakely, Food Service	2008 Capital Request	CRPC, Blakely Hall Planning Committee	Inclusion in U of M Capital Request, lobby efforts, secure funds
HEAPR Funds to make all buildings accessible	2008 Capital Request and beyond	CRPC	Secure funds, accessible and modern space across campus
Briggs Library Renovation	2010 Capital Request	CRPC, Library planning committee	Inclusion in U of M Capital Request, lobby efforts, fundraising goals achieved, secure funds
HFA Phase III	2012 Capital Request	CRPC, HFA Phase III planning committee	Inclusion in U of M Capital Request, lobby efforts, fundraising goals achieved, secure funds

Endnotes

Citations and References

Below are listed internet addresses and other resources used by the Task Force.

1. The framing goal, vision, mission, and values of the University's Strategic Positioning process are outlined in *The University of Minnesota: Advancing the Public Good*, available at: http://www1.umn.edu/systemwide/strategic_positioning/goal.html
2. A complete reporting of kick off, focus groups, survey, and interview feedback, available at: <http://www.morris.umn.edu/strategic/>
3. A current version of the University of Minnesota, Morris Mission, available on page six at: <http://www.catalogs.umn.edu/download/UMM/mrsgeninfo07.pdf>
4. The framing concepts for respective coordinate campuses are outlined in *The University of Minnesota: Advancing the Public Good*, available at: http://www1.umn.edu/systemwide/strategic_positioning/campuses.html
5. A comprehensive review of existing Green Campus Initiatives, available at: <http://www.morris.umn.edu/greencampus/>
6. Complete enrollment, retention, and graduation statistics prepared by UMM Institutional Research, available at: <http://www.morris.umn.edu/academic/reports.html>
7. Complete enrollment and staffing statistics prepared by UMM Institutional Research, available at: <http://www.morris.umn.edu/academic/reports.html>
8. Comprehension data regarding national scholarship opportunities at UMM, available at: <http://www.morris.umn.edu/cerp/abroad/>
9. Information regarding the UMM First Year Seminar program, available at: <http://www.morris.umn.edu/academic/is1001/>
Information regarding the UMM Service Learning program, available at: <http://www.morris.umn.edu/academic/sl/>
10. Information regarding the UMM Undergraduate Research Symposium, available at: <http://www.morris.umn.edu/urs/>
11. Information regarding the Morris Academic Partnership program, available at: http://www.morris.umn.edu/services/acad_affairs/aavarious.html
12. Information regarding faculty research and creative activity, see survey results of Faculty Opinion of Administration Survey, Faculty Quality of Life Survey, and Faculty Affairs Committee Research & Scholarship Survey. Information regarding UMM faculty leaves, available at: http://www.morris.umn.edu/services/acad_affairs/leaves.html
13. Information regarding study abroad opportunities at UMM, available at: <http://www.morris.umn.edu/cerp/abroad/>
14. Complete information regarding Continuing Education and Regional Programs, available at: <http://www.morris.umn.edu/cerp/>
15. Complete information regarding the Center for Small Towns, available at: <http://www.morris.umn.edu/cst/>

- 16.** Information regarding *The Deciding Project*, a UMM program geared toward students with undecided major in order to help with retention efforts, available at:
<http://www.morris.umn.edu/academic/advising/undecidedmajor.htm>
- 17.** Information regarding the annual UMM Multicultural Student Leadership Retreat, available at: <http://www.morris.umn.edu/services/stac/mslr.html>
- 18.** Informational regarding shared governance at UMM, available at:
<http://www.morris.umn.edu/committees/>

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Appended Materials for Task Force Final Recommendations

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Appendix G.	University of Minnesota, Morris Enrollment Growth Projections <i>Prepared by James Morales, Associate Vice Chancellor for Enrollment, February 2006.</i>	Page 38
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Appendix A

Strategic Positioning Task Force Membership

The Morris campus chose the Campus Resources and Planning Committee, one of five standing Campus Assembly committees, to fill the role of the Strategic Positioning Task Force. The Committee has a broad membership of faculty, staff, students, and administrators, so using this existing committee reduced the workload for members while ensuring a diverse range of insights.

Task Force Chair

- Angel (Andy) Lopez, *Professor of Computer Science*

Task Force Members

- James (Jim) Carlson, *Professor of Music (2005-2006)*
- Joseph Basel, *Student, Economics and Management (2006-2007)*
- Jonathan Bringewatt, *Student, Political Science and History (2006-2007)*
- LeAnn Dean, *Director, Rodney A. Briggs Library*
- Michele Handlin, *Student, Environmental Science and Social Science (Spring Semester 2006)*
- Sara Haugen, *Coordinator, Commission on Women*
- Bryan Herrmann, *Assistant Director of Admissions*
- Kenneth Hodgson, *Associate Professor of Music (2006-2007)*
- Kristi Kehrwald, *Student, Global Studies and Political Science (Fall Semester 2005)*
- Arne Kildegaard, *Associate Professor of Economics*
- Pareena Lawrence, *Associate Professor of Economics & Management*
- Tim Lindberg, *Student, History and Political Science (2005-2006)*
- Sarah Mattson, *Human Resource Director*
- Madeline (Maddy) Maxeiner, *Associate Vice Chancellor for External Relations*
- Cassie McMahon, *Student, Environmental Studies and Economics (2006-2007)*
- Daniel Moore, *Student, Global Business and World Politics*
- Lowell Rasmussen, *Associate Vice Chancellor for Physical Plant and Master Planning*
- Tim Soderberg, *Assistant Professor of Chemistry (2005-2006)*
- Sharon Van Eps, *Program Advisor, Center for International Programs*
- Roger Wareham, *Pre-Award Coordinator, Grants Development Office (Fall Semester 2006)*
- Theresa Wivinus, *Student, Sociology and Women's Studies (2005-2006)*
- Peter Wyckoff, *Associate Professor of Biology*

Appendix B

Task Force Charge Letter

DATE: September 13, 2005
MEMO TO: Members of the UMM Strategic Positioning Task Force
FROM: Sam Schuman, Chancellor
RE: UMM Strategic Positioning Task Force Charge

Thank you for agreeing to serve on the University of Minnesota, Morris Strategic Positioning Task Force. The University's Strategic Positioning process presents a remarkable opportunity for our campus to reaffirm its mission and set a new direction that will build upon its excellence and ensure its future vitality. With your help, we will identify what Morris' unique contribution can be to the University's goal of becoming one of the top three public research universities in the world, and recommend new ways to serve our students and the state. As you pursue your charge, I ask that you engage in bold and visionary thinking and identify strategies that will propel us forward.

President Bruininks has asked that each strategic positioning task force consider the following strategic action areas that were identified in the University's strategic positioning recommendations, Transforming the University of Minnesota, endorsed by the Board of Regents on June 10, 2005.

- Recruit, nurture, challenge, and educate outstanding students who are bright, curious and highly motivated.
- Recruit, mentor, reward and retain world-class faculty and staff who are innovative, energetic, and dedicated to the highest standards of excellence.
- Promote an effective organizational culture that is committed to excellence and responsive to change.
- Exercise responsible stewardship by setting priorities and enhancing and effectively utilizing resources and infrastructure.
- Communicate clearly and credibly with all of our constituencies and practice public engagement responsive to the public good.

During the development of the University's strategic positioning plan, certain common themes have been identified and are important to keep in mind as we begin our work. The themes are:

- Strong academic programs and leadership.
- Improved access to success for students demonstrating that a better education leads directly to better results.
- Excellence in research.
- Lowered economic costs through improved services and strengthened core investments.
- Greater alignment across all programs and services.

As you pursue your work, please also keep in mind the following questions:

- What role should the Morris campus play as part of the University's goal of being a top 3 public research institution?
- What strategic directions will Morris need to take to maximize this role?

- What are the actions recommended to achieve these directions, including opportunities for reallocation of resources?
- What special contributions should the Morris campus make to our region of the state?
- How will demographic, economic, and enrollment trends affect the future of UMM and what steps must be taken as a result?
- What are our areas of excellence and/or comparative advantage?
- What are the measures of progress and expected impact?
- What are the incentives necessary to achieve success?
- What are the barriers to success? What strategies exist to overcome the barriers?

The Task Force Charge

Each campus in the University system has a responsibility, consistent with its history and mission, to move toward making the University one of the top three public research institutions in the world. This task force is asked to conduct a thorough evaluation of the mission, priorities, strengths, and future direction of the Morris campus as part of this institutional commitment. This evaluation should carefully examine the current status of the campus and its programs, and determine where change is needed to address current trends and anticipate future needs. The task force is asked to conduct this evaluation under the following operating principles:

- Recognition and attribution of full costs and cost increases;
- Rationalization of level of state support;
- Revenue expectations and enhancements;
- Academic enhancement and accountability;
- Enrollment models, expectations, and plan;
- Enhanced regional service and programs;
- Increased connection with relevant Twin Cities campus initiatives and resources.

Specifically, the task force should:

- Evaluate background data about demographic, programmatic, and fiscal issues facing the campus;
- Address enrollment issues and associated financial considerations;
- Identify ways to partner with the other campuses and with Twin Cities campus colleges and units to leverage complementary strengths and identify efficiencies;
- Establish a financial and academic accountability framework under which the campus will operate;
- Develop operating assumptions that lead to successful implementation of goals;
- Develop measures by which progress toward goals will be assessed.

Appendix C

University Criteria for Review of Programs

The following distinct criteria that have been established over the past 20 years at the University were identified to review programs and establish new priorities:

- **Centrality to Mission:** A program or service is more highly valued if it contributes significantly to the core mission of the University.
- **Quality, Productivity, and Impact:** A program or service should meet objective and evaluative standards of high quality, productivity, public engagement, and impact.
- **Uniqueness and Comparative Advantage:** A program should be evaluated based on characteristics that make it an exceptional strength for the University compared to other programs in Minnesota or at other peer institutions.
- **Enhancement of Academic Synergies:** A program/service should be organized to promote and facilitate synergies that build relationships and interdisciplinary, multicultural, international and other collaborations.
- **Demand and Resources:** Evaluation of a program or service should consider current and projected demand and the potential and real availability of resources for funding program or service costs.
- **Efficiency and Effectiveness:** A program or service should be evaluated based on its effectiveness and how efficiently it operates.
- **Development and Leveraging of Resources:** Any new or existing program or service should be evaluated on its potential to develop new resources and leveraging existing resources.

Appendix D: University of Minnesota, Morris Background Data

The Task Force reviewed the following data, prepared by Institutional Research and Reporting and supplemented with data from UMM's Institutional Research Office, February 2006.

UNIVERSITY OF MINNESOTA	MORRIS CAMPUS							14-Feb-06	UMNMO	Page 1 of 4	
Fiscal Year	FY1996	FY1997	FY1998	FY1999	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006
Total Headcount Students (Fall)	1,952	1,970	1,908	1,917	1,867	1,842	1,927	1,910	1,861	1,839	1,684
Undergraduate	1,944	1,959	1,900	1,913	1,789	1,758	1,813	1,789	1,728	1,685	1,533
Graduate	0	0	0	0	0	0	0	0	0	0	0
Professional	0	0	0	0	0	0	0	0	0	0	0
Unclassified	8	11	8	4	78	84	114	121	133	154	151
New Freshmen (NHS)	534	550	495	549	457	474	480	477	412	387	358
High School Rank	83.9	82.7	81.0	82.7	82.1	82.4	77.3	78.5	77.9	78.5	75.7
ACT Score	24.9	25.0	24.7	24.3	24.1	24.7	24.4	24.6	24.8	25.1	24.6
AAR Score	133.6	133.1	130.7	132.0	130.0	132.5	125.6	127.3	127.5	128.0	118.5
Total Headcount Students by Ethnicity (%)											
American Indian	3.9%	5.0%	5.5%	6.5%	6.7%	5.9%	6.4%	6.5%	7.2%	7.8%	8.8%
Asian/Pacific Islander	3.8%	3.1%	2.4%	2.7%	2.5%	2.6%	2.9%	2.7%	3.1%	3.1%	2.7%
African American	4.3%	4.2%	5.6%	5.5%	5.2%	5.6%	4.7%	3.4%	2.8%	2.2%	1.9%
Chicano/Hispanic	1.5%	1.9%	1.6%	1.1%	1.2%	1.4%	1.4%	1.6%	1.5%	1.5%	1.4%
International	0.9%	0.9%	1.3%	0.4%	0.8%	0.3%	0.8%	1.1%	1.1%	1.2%	1.1%
Caucasian	85.0%	84.4%	83.3%	82.8%	82.9%	81.5%	80.4%	80.7%	80.4%	79.3%	78.0%
Not Reported	0.6%	0.5%	0.4%	0.9%	0.7%	2.7%	3.4%	3.9%	3.9%	4.8%	6.1%
Total Headcount Students by Gender (%)											
Female	55.5%	56.7%	57.3%	59.6%	58.6%	57.2%	59.3%	60.4%	60.0%	60.4%	59.9%
Male	44.5%	43.3%	42.7%	40.4%	41.1%	42.1%	40.6%	39.5%	39.8%	39.4%	39.7%
Unknown	0.0%	0.0%	0.0%	0.0%	0.3%	0.7%	0.2%	0.1%	0.2%	0.2%	0.4%
Total Post-Doctoral Associates	na	na	na	na	na	na	0	0	0	0	0
Total FYE Students	1,910	1,897	1,841	1,907	1,825	1,804	1,831	1,789	1,872	1,794	
Lower Division	1,185	1,166	1,112	1,180	977	972	991	940	916	840	
Upper Division	725	731	729	727	848	832	839	849	956	955	
Graduate & Professional	0	0	0	0	0	0	0	0	0	0	
Total Degrees Awarded	362	371	384	347	340	315	304	325	350	348	
Undergraduate Degrees	362	371	384	347	340	315	304	325	350	348	
Masters Degrees	0	0	0	0	0	0	0	0	0	0	
Doctoral and 1st Prof Degrees	0	0	0	0	0	0	0	0	0	0	
Retention Rates (for Freshmen Admitted Fall of Fiscal Year)											
First Year Retention	81.1%	86.0%	83.1%	81.6%	80.4%	85.0%	82.5%	79.6%	86.7%	85.6%	
Second Year Retention	71.0%	74.9%	71.6%	66.7%	69.3%	71.7%	70.0%	74.3%	76.7%	na	
Graduation Rates (for Freshmen Admitted Fall of Fiscal Year)											
Four-Year Graduation Rate	45.3%	45.4%	38.2%	39.7%	40.2%	40.9%	44.1%	na	na	na	
Five-Year Graduation Rate	59.0%	61.7%	55.7%	53.6%	55.8%	56.3%	na	na	na	na	
Six-Year Graduation Rate	61.4%	63.2%	60.3%	57.1%	58.7%	na	na	na	na	na	

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	Fiscal Year	FY1996	FY1997	FY1998	FY1999	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005
Total FTE Employees		296	330	319	307	356	380	388	391	378	373
Civil Service		145	156	152	131	174	188	190	191	182	179
Administrative		27	34	36	34	34	33	36	38	37	35
Tenured/Tenure Track Faculty		74	90	84	85	90	97	89	102	110	107
Other Faculty		32	27	26	28	26	27	36	23	14	14
Professional		18	23	22	29	31	35	37	38	36	39
Total Head Count Employees		318	358	344	365	383	417	420	429	407	407
Civil Service		159	172	170	177	188	203	205	207	194	191
Administrative		27	36	37	34	35	34	37	39	38	36
Tenured/Tenure Track Faculty		74	90	84	85	90	97	90	102	110	108
Other Faculty		33	28	26	28	27	29	38	25	15	17
Professional		25	32	27	41	43	54	50	56	50	55
Tenured/Tenure Track Faculty HC		74	90	84	85	90	97	90	102	110	108
Professor		26	26	23	25	23	23	20	23	24	22
Associate Professor		25	26	25	32	33	32	36	37	41	42
Assistant Professor		23	35	31	25	31	37	32	37	39	42
Instructor		0	3	5	3	3	5	2	5	6	2
Employees of Color (% Tot HC)		7.2%	8.7%	8.1%	7.9%	6.3%	7.7%	7.9%	7.7%	6.4%	7.6%
Civil Service		3.8%	4.1%	3.5%	4.0%	3.2%	3.9%	4.9%	3.9%	2.6%	4.2%
Administrative		11.1%	16.7%	18.9%	14.7%	8.6%	8.8%	5.4%	7.7%	5.3%	8.3%
Tenured/Tenure Track Faculty		12.2%	11.1%	10.7%	11.8%	8.9%	11.3%	12.2%	14.7%	11.8%	12.0%
Other Faculty		9.1%	14.3%	7.7%	7.1%	7.4%	10.3%	13.2%	4.0%	6.7%	5.9%
Professional		8.0%	12.5%	14.8%	12.2%	11.6%	13.0%	10.0%	10.7%	10.0%	10.9%
Total Student Employees (HC)		na	na	na	na	na	na	na	na	368	324
Non-Academic		na	na	na	na	na	na	na	na	368	324
Academic		na	na	na	na	na	na	na	na	0	0
Tuition Revenue		na	na	na	na	\$7,242,357	\$7,590,451	\$8,564,807	\$9,504,118	\$10,355,491	\$10,876,328
Registration Activity (25%)		na	na	na	na	\$1,834,553	\$1,943,466	\$2,167,360	\$2,412,635	\$2,581,178	\$2,719,085
Instructional Activity (75%)		na	na	na	na	\$5,407,804	\$5,646,985	\$6,397,447	\$7,091,483	\$7,774,313	\$8,157,243
Expenditures by Fund Source		\$26,225,904	\$25,794,951	\$27,114,859	\$29,628,443	\$31,838,857	\$33,534,380	\$36,511,729	\$36,906,827	\$36,219,565	\$36,084,884
State General Appropriation		\$16,466,483	\$16,793,410	\$17,563,685	\$19,525,322	\$21,203,648	\$23,025,282	\$23,945,403	\$25,226,824	\$24,606,755	\$25,580,263
Indirect Cost Recovery		\$43,588	\$57,977	\$50,064	\$59,727	\$58,858	\$60,418	\$72,385	\$73,461	\$76,478	\$82,953
Central Reserves		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$26,509
Auxiliaries & ISOs		\$4,758,224	\$4,381,549	\$4,502,253	\$4,631,607	\$4,919,041	\$4,953,864	\$6,031,284	\$5,720,184	\$5,297,798	\$4,060,808
Other Current Unrestricted Funds		\$445,870	\$218,671	\$395,879	\$299,642	\$589,515	\$282,844	\$828,860	\$366,426	\$524,066	\$950,179
Federal Appr; Grants & Contracts		\$1,899,799	\$1,931,138	\$2,028,696	\$2,249,828	\$2,272,871	\$2,505,069	\$2,661,168	\$2,810,175	\$2,621,937	\$2,292,060
State Special Appropriations		\$194,757	\$156,927	\$131,548	\$25,546	\$29,371	\$147,121	\$157,816	\$77,556	\$163,705	\$117,889
State of MN Grants & Contracts		\$1,508,680	\$1,481,008	\$1,674,054	\$1,957,955	\$1,845,930	\$1,912,722	\$1,994,599	\$1,858,401	\$1,983,251	\$2,042,421
Other Current Restricted Funds		\$908,504	\$774,270	\$768,680	\$878,816	\$919,623	\$647,059	\$820,216	\$773,799	\$945,575	\$931,803

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Fiscal Year	FY1996	FY1997	FY1998	FY1999	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	
Expenditures by Function	\$26,225,904	\$25,794,951	\$27,114,859	\$29,628,443	\$31,838,857	\$33,534,380	\$36,511,729	\$36,906,827	\$36,219,565	\$36,084,884	
Instruction	\$7,567,506	\$7,828,762	\$8,217,603	\$8,879,096	\$9,683,663	\$9,941,381	\$10,581,386	\$11,507,890	\$10,913,062	\$11,278,197	
Research	\$183,294	\$178,766	\$215,031	\$219,410	\$195,274	\$227,431	\$175,948	\$141,448	\$198,949	\$275,620	
Public Service	\$321,692	\$165,143	\$142,160	\$322,631	\$546,567	\$518,746	\$736,618	\$758,096	\$915,202	\$719,002	
Academic Support	\$2,445,625	\$2,575,179	\$2,741,246	\$2,683,848	\$3,041,293	\$3,473,213	\$3,537,737	\$4,119,890	\$4,242,320	\$4,285,964	
Student Services	\$2,565,708	\$2,474,713	\$2,828,015	\$3,149,984	\$3,280,162	\$3,908,321	\$3,826,914	\$3,232,134	\$3,085,823	\$3,308,685	
Student Financial Aid	\$3,963,433	\$4,012,742	\$4,215,870	\$5,037,017	\$4,674,881	\$4,430,987	\$4,902,864	\$5,457,355	\$5,778,365	\$5,716,869	
Institutional Support	\$1,346,298	\$1,423,164	\$1,274,329	\$1,410,813	\$1,799,679	\$2,183,274	\$2,393,971	\$1,819,467	\$1,958,452	\$2,203,836	
Plant	\$2,534,010	\$2,409,588	\$2,556,225	\$2,976,226	\$3,478,491	\$3,607,315	\$3,776,479	\$3,646,891	\$3,405,149	\$3,886,135	
Other	\$5,298,339	\$4,726,894	\$4,924,381	\$4,949,417	\$5,138,847	\$5,243,713	\$6,579,812	\$6,223,654	\$5,722,243	\$4,410,578	
Expenditures by Object	\$26,225,904	\$25,794,951	\$27,114,859	\$29,628,443	\$31,838,857	\$33,534,380	\$36,511,729	\$36,906,827	\$36,219,565	\$36,084,884	
Professor	\$1,392,423	\$1,496,081	\$1,508,059	\$1,660,866	\$1,827,630	\$1,585,750	\$1,412,978	\$1,695,066	\$1,661,858	\$1,565,414	
Associate	\$1,002,423	\$1,122,320	\$1,346,476	\$1,692,072	\$1,787,957	\$1,860,929	\$2,027,093	\$2,228,119	\$2,351,609	\$2,433,782	
Assistant	\$1,944,874	\$1,878,613	\$1,871,319	\$1,804,404	\$1,975,851	\$2,141,150	\$2,288,649	\$2,187,127	\$2,213,136	\$2,340,883	
Instructor	\$453,650	\$492,042	\$473,435	\$471,781	\$356,218	\$462,456	\$460,857	\$538,924	\$439,878	\$241,808	
Teaching/Research Assistants	\$0	\$250	\$4,621	\$0	\$1,300	\$1,776	\$2,203	\$0	\$0	\$0	
Other Academic Salaries	\$0	\$260,933	\$246,868	\$336,956	\$446,012	\$416,602	\$449,737	\$534,026	\$517,512	\$584,763	
Other Salaries	\$8,321,855	\$7,587,728	\$7,766,401	\$8,279,919	\$8,785,073	\$9,696,134	\$10,278,258	\$10,280,779	\$10,126,928	\$10,036,126	
HERDB/CUFS Accrual Adj	-\$1,826	\$693	-\$18,500	-\$554	\$522	-\$6,408	\$29,523	-\$11,750	\$26,565	-\$590,854	
Total Salaries	\$13,113,399	\$12,838,660	\$13,198,679	\$14,245,444	\$15,180,563	\$16,158,389	\$16,949,298	\$17,452,291	\$17,337,485	\$16,611,923	
Fringe Benefits	\$2,884,136	\$3,084,175	\$3,121,498	\$3,186,861	\$3,338,225	\$3,701,962	\$4,415,783	\$4,834,781	\$4,668,820	\$4,794,383	
Student Financial Aid	\$3,911,864	\$4,061,613	\$4,215,201	\$5,149,644	\$4,802,032	\$4,488,257	\$5,006,158	\$5,612,907	\$5,982,694	\$6,098,802	
Indirect Costs	\$61,573	\$81,411	\$189,811	\$109,752	\$470,073	\$280,998	\$229,976	\$233,891	\$241,738	\$241,756	
Other Expenditures	\$7,116,842	\$6,501,535	\$7,118,234	\$7,579,972	\$8,649,831	\$9,517,452	\$10,488,672	\$9,323,776	\$8,593,254	\$8,836,035	
Internal Sales	-\$861,911	-\$772,444	-\$728,563	-\$643,231	-\$601,868	-\$612,678	-\$578,159	-\$550,819	-\$604,426	-\$498,015	
Total Non-Salary	\$13,112,505	\$12,956,291	\$13,916,181	\$15,382,999	\$16,658,294	\$17,375,991	\$19,562,431	\$19,454,536	\$18,882,080	\$19,472,962	
Exp for Salary/Fringe Benefits (%)	61.0%	61.7%	60.2%	58.8%	58.2%	59.2%	58.5%	60.4%	60.8%	59.3%	
Other Expenditures (%)	39.0%	38.3%	39.8%	41.2%	41.8%	40.8%	41.5%	39.6%	39.2%	40.7%	
Grant & Contract Proposals											
Dollars	\$423,936	\$665,678	\$693,312	\$1,102,539	\$4,033,099	\$2,772,346	\$1,185,161	\$2,872,061	\$4,365,965	\$3,444,201	
Number of Proposals	28	23	33	33	20	30	28	19	28	27	
Grant & Contract Awards											
Dollars	\$497,495	\$123,089	\$198,088	\$120,280	\$677,851	\$125,728	\$700,017	\$559,174	\$533,414	\$646,616	
Number of Awards	20	13	17	15	18	12	18	14	12	13	
Voluntary Support											
Gift Production	na	na	na	\$749,771	\$2,077,348	\$1,029,681	\$1,652,910	\$1,212,522	\$255,865	\$1,099,933	
Gifts Received	na	na	na	\$834,256	\$603,809	\$502,698	\$571,600	\$511,647	\$485,824	\$687,752	
Carry Forward (Non-Sponsored)	na	na	\$1,473,882	\$2,960,064	\$2,824,894	\$1,536,198	\$2,426,596	\$2,364,769	\$2,560,266	\$2,702,181	
Carry Forward (Central Funds)	na	na	na	na	na	\$472,945	\$1,475,072	\$1,433,595	\$1,588,726	\$1,798,168	

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Fiscal Year	FY1996	FY1997	FY1998	FY1999	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	
Trends and Ratios											
Employee Groups as % of Total Employees (Head Count)											
Civil Service	50.0%	48.0%	49.4%	48.5%	49.1%	48.7%	48.8%	48.3%	47.7%	46.9%	
Administrative	8.5%	10.1%	10.8%	9.3%	9.1%	8.2%	8.8%	9.1%	9.3%	8.8%	
Tenured/Tenure Track Faculty	23.3%	25.1%	24.4%	23.3%	23.5%	23.3%	21.4%	23.8%	27.0%	26.5%	
Other Faculty	10.4%	7.8%	7.6%	7.7%	7.0%	7.0%	9.0%	5.8%	3.7%	4.2%	
Professional	7.9%	8.9%	7.8%	11.2%	11.2%	12.9%	11.9%	13.1%	12.3%	13.5%	
HC T/TT Faculty as % of Tot Fac	69.2%	76.3%	76.4%	75.2%	76.9%	77.0%	70.3%	80.3%	88.0%	86.4%	
Measures per T/TT Head Count Faculty											
Undergraduate Students	26.3	21.8	22.6	22.5	19.9	18.1	20.1	17.5	15.7	15.6	
Graduate/Professional Students	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Lower Division FYE Students	16.0	13.0	13.2	13.9	10.9	10.0	11.0	9.2	8.3	7.8	
Upper Division FYE Students	9.8	8.1	8.7	8.6	9.4	8.6	9.3	8.3	8.7	8.8	
Grad & Prof FYE Students	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Total FYE Students	25.8	21.1	21.9	22.4	20.3	18.6	20.3	17.5	17.0	16.6	
Civil Service Staff	2.15	1.91	2.02	2.08	2.09	2.09	2.28	2.03	1.76	1.77	
Administrative Staff	0.36	0.40	0.44	0.40	0.39	0.35	0.41	0.38	0.35	0.33	
Other Faculty	0.45	0.31	0.31	0.33	0.30	0.30	0.42	0.25	0.14	0.16	
Professional Staff	0.34	0.36	0.32	0.48	0.48	0.56	0.56	0.55	0.45	0.51	
Total Other Staff	3.30	2.98	3.10	3.29	3.26	3.30	3.67	3.21	2.70	2.77	
Grant & Contract Proposals: \$s	\$5,729	\$7,396	\$8,254	\$12,971	\$44,812	\$28,581	\$13,168	\$28,157	\$39,691	\$31,891	
Grant & Contract Proposals: #	0.38	0.26	0.39	0.39	0.22	0.31	0.31	0.19	0.25	0.25	
Grant & Contract Awards: \$s	\$6,723	\$1,368	\$2,358	\$1,415	\$7,532	\$1,296	\$7,778	\$5,482	\$4,849	\$5,987	
Grant & Contract Awards: #	0.27	0.14	0.20	0.18	0.20	0.12	0.20	0.14	0.11	0.12	
Undergraduate Degrees	4.9	4.1	4.6	4.1	3.8	3.2	3.4	3.2	3.2	3.2	
Graduate/Professional Degrees	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Total Degrees	4.9	4.1	4.6	4.1	3.8	3.2	3.4	3.2	3.2	3.2	
Measures per Total Head Count Faculty											
Undergraduate Students	18.2	16.6	17.3	16.9	15.3	14.0	14.2	14.1	13.8	13.5	
Graduate/Professional Students	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Lower Division FYE Students	11.1	9.9	10.1	10.4	8.4	7.7	7.7	7.4	7.3	6.7	
Upper Division FYE Students	6.8	6.2	6.6	6.4	7.2	6.6	6.6	6.7	7.6	7.6	
Grad & Prof FYE Students	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Total FYE Students	17.9	16.1	16.7	16.9	15.6	14.3	14.3	14.1	15.0	14.4	
Non-Sponsored Carry Forward as % of Total Unrestricted Expenditures											
	na	na	6.5%	12.1%	10.6%	5.4%	7.9%	7.5%	8.4%	8.8%	

Appendix E: Strategic Comparisons to Peer Institutions

The following list compares institutions sharing membership in the Council of Public Liberal Arts Colleges (COPLAC), prepared by Pareena Lawrence, Associate Professor of Economics & Management, assisted by Adam Turgeon, student.

Institution	State	Distance from Metro Area (miles) (city over 50,000)	Population of Town	Student Population	Number of Programs/ Majors	Graduate Programs?	Professional Programs?	Year Established
Ramapo College of NJ	NJ	33.1	26,000	5,500	38	yes	yes	1969
Sonoma State University	CA	44.3	42,236	6,481	41	yes	no	1960
Eastern CT State University	CT	21.7	15,823	4,606	31	yes	no	1889
Keene State College	NH	92.9	22,563	4,370	35	yes	no	1909
St. Mary's College of MD	MD	47.7	2,290	1,656	21	yes	yes	1840
New College of Florida	FL	0.0	52,715	761	30	no	no	1960
Mass. College of Lib. Arts	MA	45.8	14,681	1,430	15	yes	no	1894
U of NC, Asheville	NC	0.0	68,889	3,124	31	yes	no	1961
SUNY College at Geneseo	NY	29.0	9,654	5,292	54	yes	no	1867
College of Charleston	SC	0.0	96,650	9,501	45	yes	no	1770
University of Wis.-Superior	WI	5.5	27,368	2,507	40	yes	no	1893
Truman State University	MO	87.8	16,988	5,474	45	yes	yes	1867
Georgia College & State U	GA	33.6	18,757	4,782	40	yes	no	1889
U of Minnesota, Morris	MN	99.2	5,068	1,700	30	no	no	1964
Henderson State University	AR	66.0	10,912	2,728	29	yes	yes	1914
Southern Oregon University	OR	14.7	19,522	4,238	35	yes	no	1926
U of Maine at Farmington	ME	70.0	7,410	2,278	32	no	no	1864
University of Montevallo	AL	37.0	4,869	2,557	25	yes	yes	1896
Fort Lewis College	CO	160.6	13,922	3,829	25	no	no	1964
Evergreen State College	WA	26.6	42,514	3,962	48	yes	no	1971
Mary Washington College	VA	52.7	19,279	3,951	33	yes	no	1938

The following list compares institutions included in the “Morris 14” peer comparison group.

Institution	State	Distance from Metro Area (miles) (city over 50,000)	Population of Town	Student Population	Number of Programs/ Majors	Graduate Programs?	Professional Programs?	Year Established
Carleton College	MN	34.6	17,147	1,936	34	no	no	1866
Ramapo Coll New Jersey	NJ	33.1	26,000	5,500	38	yes	yes	1969
Macalester College	MN	0.0	287,151	1,843	35	no	no	1874
St. Mary's Coll.of Maryland	MD	47.7	2,290	1,656	21	yes	yes	1840
Saint John's U	MN	11.3	3,516	1,842	40	yes	no	1870
St. Olaf College	MN	34.6	17,147	3,007	44	no	no	1874
Gustavus Adolphus Coll	MN	65.0	9,747	2,545	75	no	no	1862
U North Carolina-Asheville	NC	0.0	68,889	3,124	31	yes	no	1961
Coll Saint Benedict	MN	9.7	4,400	1,992	40	no	no	1961
Hamline U	MN	0.0	287,151	1,944	29	yes	yes	1854
Concordia Coll-Moorhead	MN	3.5	32,177	2,686	78	yes	no	1891
U Minnesota-Morris	MN	99.2	5,068	1,700	30	no	no	1964
U Maine-Farmington	ME	70.0	7,410	2,278	32	no	no	1864
Mary Washington Coll	VA	52.7	19,279	3,951	33	yes	no	1938

Appendix F

Admitted Student Questionnaire

Prepared by The College Board, a study of students admitted to UMM who chose to attend other institutions. Questionnaire results for fall 2003 and fall 2005.

ASQ Plus 2003 Summary – Non-Enrolling Students

Number of Students Surveyed: 383/Respondents: 87/Percent: 23%

Gender: 72% female/28% male

Race/Ethnicity: 86% White/6% Asian American/5% African American

Median Income: \$69,000

Geographic Origin: 82% Twin Cities/6% Northern Minnesota/4% Western South Dakota

Top Zip Codes: 553/554/551/550/563

Median ACT Score: 28

Most Important College Characteristics:

1. Availability of Majors
2. Personal Attention
3. Value for the Price
4. Cost of Attendance

Least Important College Characteristics:

1. Availability of recreational facilities
2. Attractiveness of campus
3. Special academic programs
4. Access to off-campus activities

Ratings for UMM on Certain College Characteristics:

	Excellent	Very Good	Good	Poor/Fair
1. Surroundings:	10%	19%	29%	42%
2. Quality of Campus Housing:	N/A	N/A	N/A	N/A
3. Access to Off-Campus Activities:	N/A	N/A	N/A	N/A
4. Availability of Majors:	N/A	N/A	N/A	N/A

Images Most Frequently Associated with our College:

2. Friendly
3. Isolated
4. Intellectual
5. Inexpensive

Average Aid Awarded:	By Our College (Enrolling)	By College Attending (Non-Enrolling)
Work Study:	\$1,418	\$1,868
Loans:	\$4,676	\$5,446
Need-Based Aid:	\$3,162	\$9,731
Merit Aid:	\$3,902	\$7,044
Total Award:	\$7,287	\$15,983

ASQ Plus 2005 Summary – Non-Enrolling Students

Number of Students Surveyed: 435/Respondents: 30/Percent: 7%

Gender: 68% female/32% male

Race/Ethnicity: 90% White/5% American Indian/5% Hispanic

Median Income: \$68,000

Geographic Origin: 75% Twin Cities/20% Northern Minnesota/5% Central Minnesota

Top Zip Codes: 553/562/563/551/566

Median ACT Score: 26

Most Important College Characteristics:

1. Availability of Majors
2. Quality of Academic Facilities
3. Academic Reputation
4. Personal Attention

Least Important College Characteristics:

1. Availability of recreational facilities
2. Attractiveness of campus
3. Special academic programs
4. Access to off-campus activities

Ratings for UMM on Certain College Characteristics:

	Excellent	Very Good	Good	Poor/Fair
1. Surroundings:	14%	14%	41%	32%
2. Quality of Campus Housing:	0%	63%	25%	13%
3. Access to Off-Campus Activities:	5%	42%	26%	26%
4. Availability of Majors:	28%	52%	8%	12%

Images Most Frequently Associated with our College:

1. Friendly
2. Isolated
3. Intellectual
4. Comfortable

Average Aid Awarded:	By Our College (Enrolling)	By College Attending (Non-Enrolling)
Work Study:	\$2,737	\$2,100
Loans:	\$7,962	\$2,998
Need-Based Aid:	\$5,226	\$8,194
Merit Aid:	\$3,696	\$8,833
Total Award:	\$10,432	\$15,409

Appendix G

University of Minnesota, Morris Enrollment Growth Projections

Prepared by James Morales, Associate Vice Chancellor for Enrollment, February 2006.

Year	NHS	NAS	Non-Degree	Total New	Total Continuing	Total UMM Enrollment
1983-84	476	58	26	560	1043	1603
1984-85	490	67	26	583	1082	1665
1985-86	468	78	33	579	1103	1682
1986-87	527	83	17	627	1147	1774
1987-88	660	86	13	759	1208	1967
1988-89	582	64	4	650	1371	2021
1989-90	520	51	7	578	1463	2041
1990-91	493	43	1	537	1484	2021
1991-92	511	38	2	551	1364	1915
1992-93	582	42	0	624	1299	1923
1993-94	596	43	1	640	1293	1933
1994-95	549	46	4	599	1325	1924
1995-96	534	73	5	612	1340	1952
1996-97	550	67	5	622	1348	1970
1997-98	495	78	2	575	1333	1908
1998-99	549	100	2	651	1266	1917
1999-00	457	78	68	603	1264	1867
2000-01	474	94	63	631	1211	1842
2001-02	480	82	85	647	1280	1927
2002-03	477	67	83	627	1283	1910
2003-04	412	74	103	589	1272	1861
2004-05	387	63	115	565	1274	1839
2005-06	358	56	115	529	1155	1684
2006-07	410	75	110	595	1111	1706
2007-08	435	80	110	625	1132	1757
2008-09	450	80	110	640	1189	1829
2009-10	465	85	110	660	1265	1925
2010-11	480	90	110	680	1309	1989
2011-12	495	90	110	695	1346	2041
2012-13	510	100	110	720	1384	2104

Appendix H

University of Minnesota, Morris Endowment Growth Projections

Prepared by Maddy Maxeiner, Associate Vice Chancellor for External Relations, assisted by Pareena Lawrence, Associate Professor of Economics & Management, March 2006. These projections are based on figures that include UMM's fundraising efforts and the performance of our endowment from 1992 to 2005. Assuming a similar average rate of growth, we project the following endowment growth:

Year	Projected Total Endowment
2006	\$8.8 million
2007	\$10.0 million
2008	\$11.3 million
2009	\$12.9 million
2010	\$14.6 million
2011	\$16.6 million
2012	\$18.8 million
2013	\$21.4 million
2014	\$24.3 million
2015	\$27.6 million

Appendix I: Review of External Relations Staffing Resources

Prepared by UMM's Office of External Relations, a comparison of external relations, alumni relations, and development staff resources at other small colleges and universities.

Institution	Enroll ment	Alumni Base ¹	Alumni Relations ²	Annual Giving ²	Development ²	Communications ²	Annual Giving Dollars Raised FY05
University of North Carolina, Asheville	3,572	12,000	2	2	6	5	\$155,000-phonathon & direct mail & \$150,000-scholarships and personal solicitations
College of Charleston	9,866	36,000	7.5	4	9	6	\$1,000,000
Concordia College, Moorhead	2,812	20,000	4	6	13	12	\$3,227,749-unrestricted
University of Maine, Farmington	2,349	15,000	4	AR/AG	1	5	\$3.3 million total over 2 years of campaign, \$1.5 million from alumni
Gustavus Adolphus	2,577	30,000	4	4	20	10	\$951,000 unrestricted
Mary Washington University	4,130	28,000	3	5.5	8	10	\$2,057,774-unrestricted and restricted for current use \$1,088,945- specifically to the Fund for Mary Washington
Ramapo College of New Jersey	5,278	17,000	4	AR/AG	12	6	\$183,000
University of Minnesota, Morris	1,684	16,688	2.75	AR/AG	3	3	\$374,571
College of St. Benedict/St. John's University	CSB- 2,033 SJU- 1,895	CSB- 12,921 grads 4,091 non- grads addressable SJU-22,000	CSB-2 SJU-7(AR/AG combined)	CSB-2	CSB-16 SJU-10	12	CSB-\$916,971-unrestricted, \$1,320,603-restricted(incl. annual giving to scholarship funds) SJU-\$2,163,000-unrestricted to the Annual Fund
St. Mary's College of Maryland	1,935	9,000	2	2	10	5.5	\$40,000,000-Completed campaign total. Annual giving figures rolled into campaign totals.
St. Olaf College	3,046	30,000	5	6	21	8	\$3.5 million-unrestricted
Truman State University	5,616	47,936	2	2	8	4	\$750,000
Virginia Military Institute	1,300	17,000	4	8	20	6	\$2.1 million annual giving dollars raised

NOTES: ¹Alumni base is defined as living, addressable alumni.

²Head counts include professional and support staff. Head counts may include individuals with responsibilities in multiple departments.

Appendix J

Summary of “Morris 14” Comparison Group

Below are listed the institutions that the University of Minnesota, Morris considers to be our peers.

- Ramapo College of New Jersey
- Macalester College, Minnesota
- Carleton College, Minnesota
- St. Mary’s College of Maryland
- Hamline University, Minnesota
- University of North Carolina at Asheville
- St. Olaf College, Minnesota
- University of Mary Washington, Virginia
- Concordia College (Moorhead), Minnesota
- St. John’s University, Minnesota
- Gustavus Adolphus College, Minnesota
- University of Maine at Farmington
- College of Saint Benedict, Minnesota
- Evergreen State College, Washington

Appendix K

Comprehensive Listing of Existing Partnerships

Below are listed a sampling of relationships between the University of Minnesota, Morris and academic, research, and outreach partners.

Academic Partners

- Beijing Union University, Beijing, China
- Capital Normal University, Beijing, China
- GenEdWeb Collaboration for Post Secondary Education Opportunities
- Shanghai University, Shanghai, China
- University of Minnesota China Center
- University of Minnesota, Duluth

Research Partners

- Agricultural Utilization Research Institute
- West Central Research and Outreach Center
- University of Minnesota College of Agriculture, Food, and Environmental Sciences
- USDA North Central Soil Conservation Research Laboratory

Outreach Partners

- Center for Small Towns
- City of Morris
- Community Outreach Partnership Center Program
- Henjum Institute for Creative Study
- Minnesota Public Radio
- Minnesota State Arts Board
- Morris Area School District
- Morris Chamber of Commerce
- Pioneer Public Television
- Pride of the Prairie Local Foods Initiative
- Rodney A. Briggs Library
- Stevens County Medical Center
- TREC (Tutoring, Reading, Enabling Children) Program
- UMM Big Friend/Little Friend Program
- University of Minnesota Regional Sustainable Development Partnership

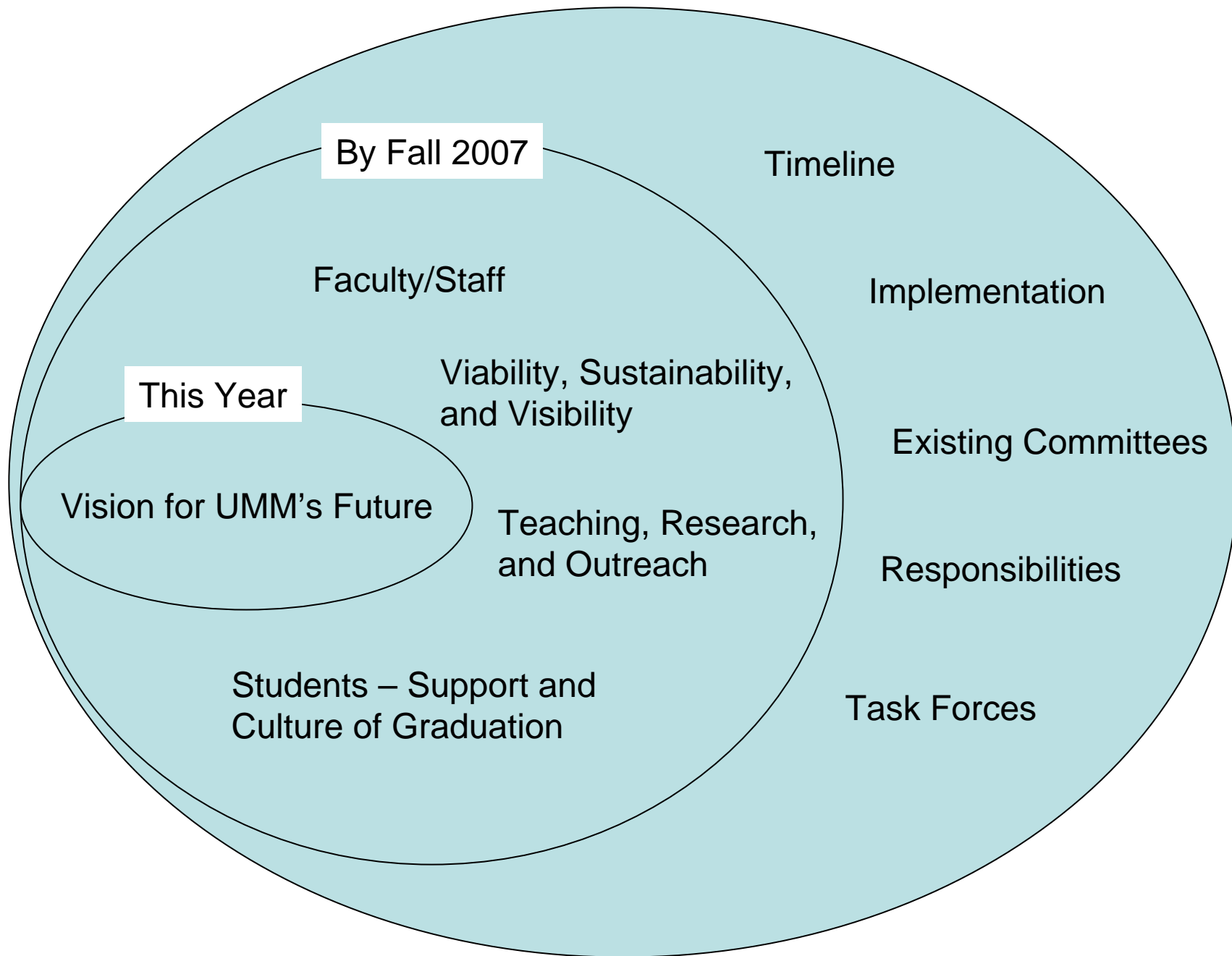
Strategic Positioning At UMM

Presentation for Information
at

October 4, 2006
Campus Assembly

Background

- U of M Initial Strategic Planning – August 2004
- UMM Strategic Planning began Summer 2005
- Kickoff event, focus groups, consultant, open forums, online surveys, consultation with external audiences – Fall 2005
- Initial Report submitted March 31, 2006
- Feedback from Central Administration - August 2006
- Response to feedback - September 15, 2006
- Consultation with all assembly committees, MCSA, divisions.
- Upcoming open forum - October 9, 2006
- Revised Report due November 1, 2006
- Implementation Phase - ongoing



Vision for UMM's Future

- The University of Minnesota, Morris provides an undergraduate liberal arts education of uncompromising rigor for a diverse student body. As a public honors college, UMM is committed to outstanding teaching and learning, faculty scholarship and undergraduate research, genuine outreach and engagement. Our small, residential academic setting fosters authentic relationships, and the University serves as an educational and cultural resource for the region, nation, and world. A personalized educational experience prepares graduates to be global citizens who are interculturally competent, civically engaged, and effective stewards of their environments.

Strategic Goal

- To position the University of Minnesota, Morris as the best public liberal arts college in the nation, in the top tier of national liberal arts colleges, and as a public honors college.

Defined Deliverables

- Exceptional student experience
- Goal for 4 Year graduation rate is 60% (currently 44%), 5 Year graduation rate is 75% (currently 56%)
- A student body of 2100 students
- A balanced budget

To achieve these goals and deliverables the strategic positioning process suggests undertaking the following initiatives

Teaching and Outreach Initiatives

Initiatives	Administrative & Implementation Responsibility	Timeline	Consultation Process	Metrics and Measurement
Integrate Green Initiatives – Interdisciplinary Activity	Dean, AVC Physical Plant, Divisions, Curriculum, Sustainability Coordinator	Begin Planning Spring 2007	Curriculum, CRPC, WCROC,	Increased recognition from external rating organizations, Integration into curriculum
Integration of liberal learning outcomes - Writing, speaking and critical thinking	Dean, Divisions, Curriculum	Begin Planning Spring 2007	Curriculum, Disciplines, Scholastic, FYS	Improved NSSE results and graduate exit survey results
Improve participation in and documentation of civic engagement, public service, and leadership	Dean, VCSA, Curriculum	Develop plan Fall 2007	Curriculum, Disciplines, Student Affairs, FYS	Increased participation, Improved NSSE results and graduate exit survey results
Integration of current global perspectives across curriculum	Chancellor, Dean, Curriculum	Part started (Bush Grant), Develop plan for Fall 2007	Curriculum, CRPC, Scholastic, IPC, DSAAG	Integration into curriculum, improved NSSE results and graduate exit survey results

Faculty and Staff Initiatives

Initiatives	Administrative & Implementation Responsibility	Timeline	Consultation Process	Metrics and Measurements
Increase support, recognition and visibility of Faculty Scholarship	Chancellor, Dean, Division Chairs, Grants Development	Continual implementation	Faculty Center, Faculty Affairs & Consultative Committee	Number of external grants received, number of national presentations supported
Develop professional development and mentoring opportunities	Chancellor, Dean, Human Resources, Division Chairs, Directors	Ongoing	Division Chairs, Administrative Committee	Retention of faculty and staff, attendance at conferences, hosting relevant campus workshops and meetings
Provide comparable salaries for faculty and staff	Chancellor, Dean, Division Chairs, Directors, Human Resources	Beginning Fall 2006	CRPC, Faculty Affairs, Consultative, USA	Increase standing on salary listing in Minnesota
Develop and implement a campus-wide technology plan	Chancellor, Dean, AVC for Physical Plant, Computing Services, Media Services, Library	Beginning Spring 2007	Appropriate directors, MCSA, CRPC	Secure ongoing funds to improve and maintain our technology advantage

Student Initiatives

Initiatives	Administrative & Implementation Responsibility	Timeline	Consultation Process	Metrics and Measurement
Develop cohesive year-long "First Year Experience"	VCSA, Dean, AVC Student Life, Student Activities, Residential Life	Begin Discussions Fall 2006 (Reestablishment of the FYE Subcommittee)	Scholastic, Curriculum, FYS, Residential Life, Student Services	Increased retention, improved experience, improved graduation rate
Integrated Multi-cultural Campus Life and Interculturally competent graduates	Chancellor, VCSA, Dean,	Fall 2007	Faculty Development, Multi-Ethnic Experience, Student Services, IPC, etc.	Increase recruitment and retention of traditionally underserved students, improve student satisfaction survey results for this group
Create academic enrichment office	Dean, Discussion Committee on Academic Enrichment	Task Force formed Fall 2006	CRPC, Scholastic, Curriculum, Consultative, Honors Program, CIP, etc.	Increased awareness (internally and externally) and success in research, study abroad, etc.
Strengthen "life planning" student support	VCSA, Dean, Advising, Career Center, Counseling	Discussions begin immediately	Student Services, Scholastic, Retention Work Group, External Relations and Alumni Office	Increased satisfaction in life planning area of the graduate exit survey, Increased % of students using alumni career networks

Viability and Sustainability Initiatives

Initiatives	Administrative & Implementation Responsibility	Timeline	Consultation Process	Metrics and Measurement
Increase Morris Scholars Program (additional merit scholarship funds and for enrichment opportunities)	Chancellor, Enrollment, AVC External Relations, Fund Development	Beginning Fall 2006	CRPC, Retention Work Group, SAP	Increase percentage of high ability students enrolled and graduated, endowed funds to support these scholarships
Increase non-traditional revenue – private donors, facility use, grants, wind energy funds, etc.	AVC External Relations, Fund Development, CERP, VCSA, AVC Physical Plant	Ongoing	CRPC, CERP, Student Affairs, Administrative Committee, Student Services, Consultative	Increased percentage of total budget supported from these sources
Develop additional green energy initiatives and integrate into master plan	Chancellor, AVC Physical Plant	Ongoing	CRPC	Increased energy self-sufficiency, increased research opportunities
Secure full funding for Native American Tuition Waiver	Chancellor, Institutional Research	Fall 2007	CRPC, Enrollment Area, American Indian Advisory Committee, MSP	Ongoing secured funds to cover tuition to improve graduation rates of Native American students

Visibility Initiatives

Initiatives	Administrative & Implementation Responsibility	Timeline	Consultation Process	Metrics and Measurements
Brand development - market research, e.g. honors college, honors experience	Chancellor, Dean, Division Chairs, Enrollment, AVC External Relations, Communications	Immediately begin research and plan	CRPC, Curriculum, External Relations, IMG, CCG	External recognition and understanding of brand
Recruit and retain national and International students	Enrollment Area, CIP, Dean, Student Affairs	Immediately	CRPC, Scholastic, Retention Work Group, IPC,	Increased numbers of students and graduates from these markets, track cohorts
Implement campus-wide integrated marketing plan	AVC External Relations, Enrollment Area, Athletics, Communications	Immediately following market research	CRPC, IMG, CCG, Athletics, Student Affairs	External recognition and understanding of UMM experience
Update Campus Master Plan to align with strategic initiatives	AVC Physical Plant, VCSA, Dean, AVC External Relations, Communications	Fall 2007	CRPC, Divisions, ASSC	Better understanding of use and renovation of physical facilities, increased pride in campus facilities

Capital Plan

Initiatives	Administrative & Implementation Responsibility	Timeline	Consultation Process	Metrics and Measurements
Gateway to Campus: Community Services Building	AVC Physical Plant, Chancellor	2008 Capital Request	CRPC	Inclusion in U of M Capital Request, lobby efforts, secure funds
Residential Facility and Conference Center: Blakely, Food Service	AVC Physical Plant, VCSA, Residential Life, Chancellor, Finance Officer	2008 Capital Request	CRPC, Blakely Hall Planning Committee	Inclusion in U of M Capital Request, lobby efforts, secure funds
HEAPR Funds to make all buildings accessible	AVC Physical Plant, Chancellor	2008 Capital Request and beyond	CRPC	Secure funds, accessible and modern space across campus
Briggs Library Renovation	AVC Physical Plant, Library Director, Chancellor	2010 Capital Request	CRPC, Library planning committee	Inclusion in U of M Capital Request, lobby efforts, fundraising goals achieved, secure funds
HFA Phase III	AVC Physical Plant, Humanities Division, Chancellor	2012 Capital Request	CRPC, HFA Phase III planning committee	Inclusion in U of M Capital Request, lobby efforts, fundraising goals achieved, secure funds

Feedback

Attend the campus forum hosted
by the
Executive Committee,
October 9, 2006 at 4:30pm
in the
Science Auditorium