Oregon TECH

Board of Trustees

Orientation Guide

Oregon TECH
Board of Trustees

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Welcome

Dear Trustees,

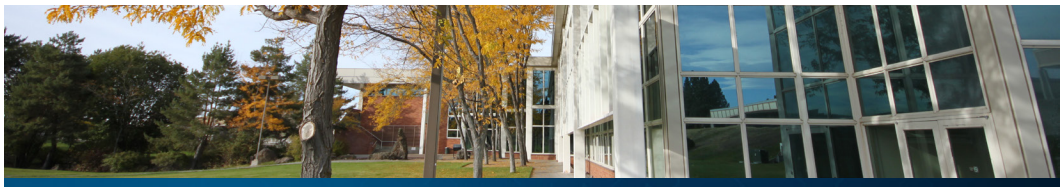
Welcome to Oregon Tech!

This guide has been prepared for you as part of your trustee orientation to Oregon Tech. These materials will assist you in becoming broadly knowledgeable about the university, its stakeholders, and the communities in which we operate. These materials include high-level information on topics such as the university's mission and organization, diversity, academics, students, faculty and staff, research, finance, administration and budget, capital construction/facilities, athletics, university advancement, legislative relations, benchmarking, and board outreach and dealing with the media. Each of these topics will be covered in depth over the coming months and as part of the board agenda going forward.

On behalf of the entire Oregon Tech community, I thank you for your willingness to guide our university in the years ahead. We have a bright future and appreciate all you will do to help us provide a high-quality education for the students we serve.

Thank you,

Chris Maples
President



CHAPTER

I

Higher Education in Oregon and at Oregon Tech

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Higher Education in Oregon and at Oregon Tech

Founded in 1947, Oregon Tech is the Pacific Northwest's only polytechnic university. It offers degree programs in engineering, engineering technologies, health technologies, management, and the arts and sciences. Oregon Tech prides itself on delivering a high-quality, hands-on educational experience. Oregon Tech is one of the nation's leading Engineering Bachelor's and Master's Universities (ranking 45th, according to *US News*).

Oregon Tech has locations throughout the Pacific Northwest. In Oregon, this includes the traditional, residential campus in Klamath Falls, the urban campus in Wilsonville, as well as sites in La Grande and Salem. In Washington, Oregon Tech offers degrees to employees of The Boeing Company at sites in the Puget Sound area. Oregon Tech Online delivers a variety of programs with convenience and flexibility. Oregon Tech's online presence was ranked 7th in the nation for blind and visually impaired students in the *Chronicle of Higher Education*.

Oregon Tech awards approximately 670 degrees each year. Graduates from Oregon Tech experience an outstanding success rate, with more than 90% either employed or enrolled in graduate school within six months of graduation.

Oregon Tech is a public, state-supported institution belonging to the Oregon University System, is accredited by the Northwest Commission on Colleges and Universities. Individual programs also are accredited by the appropriate professional organizations, including the Accreditation Board for Engineering and Technology (ABET) for engineering and engineering technology programs.

Oregon Tech also offers a full array of campus activities from concerts and comedians, nationally-ranked intercollegiate sports, intermural and club sports, and more than 50 student clubs.

The Oregon Tech Board of Trustees will strengthen education at Oregon Tech through a single focus on advancing the mission of Oregon Tech and ensuring that it is aligned with Oregon's public purpose of reaching the state's 40-40-20 goal and excelling in the education of a diverse population of highly qualified graduates, per Oregon Tech's Achievement Compact with the state.

A Mission, Governance and Organization

Mission Statement

Oregon Institute of Technology, a member of the Oregon University System, offers innovative and rigorous applied degree programs in the areas of engineering, engineering technologies, health technologies, management, and the arts and sciences. To foster student and graduate success, the university provides an intimate, hands-on learning environment, focusing on application of theory to practice. Oregon Tech offers statewide educational opportunities for the emerging needs of Oregon's citizens and provides information and technical expertise to state, national and international constituents.

Core Themes

- Applied Degree Programs
- Student and Graduate Success
- Statewide Educational Opportunities
- Public Service

Governance

Since its founding in 1947, the Oregon Institute of Technology has been governed by the Oregon State Board of Higher Education, the governing board for the seven public universities in Oregon. In 2011, the Oregon Legislative Assembly enacted Senate Bill 242, which was an amalgam of higher education reform proposals made by the Legislature's Joint Committee on Higher Education and the higher education governance reform proposals made by the Oregon University System. The bill provided the State Board of Higher Education and the chancellor with additional power and authority and the Oregon University System with relief from certain state regulatory requirements but did not provide additional authority or autonomy to the universities and their presidents.

Senate Bill 270, passed by the Legislative Assembly in 2013, established the University of Oregon, Portland State University and Oregon State University as independent public bodies with a strong Board of Trustees based on the model pioneered by Oregon Health and Science University (OHSU) when it was split off from the Oregon University System in 1995. The bill also provided the option for the technical and regional universities (TRUs), Eastern Oregon University, Oregon Institute of Technology, Southern Oregon University, and Western Oregon University, to seek approval for independent governing boards from the Governor and the State Board of Higher Education. In April 2014, the State Board of Higher Education authorized the Oregon Institute of Technology to establish a Board of Trustees, appointed by the Governor and approved by the Senate, without conditions. As of July 1, 2015, the University will be governed by its own Board of Trustees, and is considered a public body, but is "not a state agency, board, commission or institution for purposes of state statutes or constitutional provisions."

As its name indicates, the Higher Education Coordinating Commission, established by statute in 2013, serves a coordinating function relative to significant changes to the academic programs of the community colleges and public universities, the operating and capital budgets that are funded by the State of Oregon, mission approval, and strategies for achieving state post-secondary educational goals. The Oregon Tech Board of Trustees will approve the University's mission, programs, budgets, and strategies, and then forward them to the Higher Education Coordinating Commission (HECC) for review and approval in relation to the other seven publicly-assisted universities. (See HECC Strategic Plan in Appendix)

Overview of Senate Bill 270 (2013) and House Bill 3120 (2013)

Effective July 1, 2014, the University is an "independent public body" governed by the Board of Trustees much like Oregon Health and Science University is an independent public corporation governed by a board of directors. Indeed, Senate Bill 270 is largely based on the statutes applicable to OHSU. Under SB 270, the Board of Trustees has very broad authority to manage and govern the University. Under the Board's supervision, the University may operate inside or outside the State of Oregon, including in foreign countries. While the University will continue to be a governmental entity, it will not be a unit of local or municipal government or a state agency, board, commission or institution for purposes of state statutes or constitutional provisions. This provides the University with a broad exemption from state and local regulation in Oregon.

Of course, the University remains subject to a wide range of federal and some state regulation. The Board has every authority necessary or appropriate for the operation of a major public research university, including the authority to:

- Appoint and employ a President and other employees.
- Set tuition, mandatory enrollment fees, and charges, fines and fees for services, facilities, operations and programs, except that the authority to increase resident undergraduate tuition and mandatory enrollment fees is capped at five percent per year absent approval of the Higher Education Coordinating Commission or the Legislature.
- Approve the University budget.
- Manage, invest, and spend all available money without approval of the Legislature, the Oregon Department of Administrative Services, or the State Treasurer, except for the portion of the operating budget provided by the state and the proceeds of state bonds.
- Borrow money and issue bonds secured by University revenue.
- Acquire, hold, and dispose of any kind of property, real or personal, tangible or intangible. Real property will be held in the name of the "State of Oregon acting by and through the Board of Trustees of the Oregon Institute of Technology."
- Authorize the construction, improvement, and operation of any kind of building or structure.
- Acquire by condemnation any private property for public use.
- Establish any and all University policies.
- Establish, supervise and control all academic and other programs, subject to the authority of the Higher Education Coordinating Commission (HECC) to approve "significant changes in academic programs."
- Sue and be sued.
- Establish a police department and regulate traffic and parking on University property.

B Higher Education Architecture Chart

Governor

Appoints OEIB, HECC and University Board Trustees

Legislature

- Appropriates Higher Education Funding
- Determines Higher Education Policy and Governing Authorities of Boards
- Confirms Board Appointments

Oregon Education Investment Board (OEIB)

Allocates Education Funding for each education sector and makes strategic investments.

Early Learning Council

Oversees all Pre-K Programs, e.g. "Head Start"

Higher Education Coordinating Commission (HECC)

- Approves missions
- Approves programs
- Determines funding allocation formula for Community Colleges and Universities
- Conducts annual evaluation

Board of Education

Oversees K-12 Funding, Formula and Policy

Publicly Funded Community Colleges

Office of Community Colleges & Workforce Development coordinates statewide goals/ work among CCs

17 Locally-elected Boards for 17 Colleges

- Hire President
- Ensure program quality
- Ensure fiscal integrity
- Provide strategic direction

Publicly Funded Universities

Coordinate to meet statewide goals

7 Appointed university boards

- Hire President
- Ensure program quality
- Exercise fiscal stewardship
- Provide strategic direction
- Provide governance & statutory obligations

Publicly Funded Universities

- President's Council
- Provost's Council
- Interinstitutional Faculty Senate
- Legislative Council
- VPFA Council
- PIO Council
- University Shared Services Enterprise

Office of Student Access and Completion

Oversee State Financial Aid Progress

C Organizational Chart

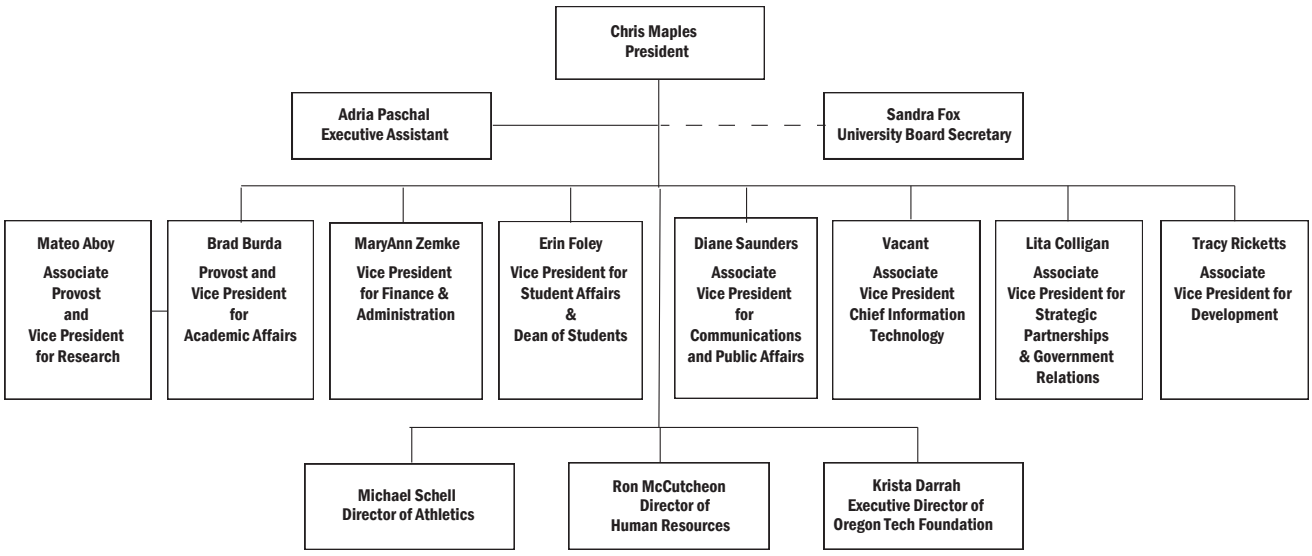
The president of the University is the "executive and governing officer of the university," the "president of the faculty," and, subject to the Board's supervision, has the authority to "direct the affairs" of the University. The faculty of the University consists of the "president and professors." In American higher education, there is a tradition of shared academic governance between and among the governing board, president and faculty, although ultimate authority resides with the governing board.

In addition to the President, there are currently seven executives of the University: Vice President for Academic Affairs and Provost, Vice President for Finance and Administration, Vice President for Student Affairs and Dean of Students, the Vice President for Research and Associate Provost for the Wilsonville Campus, the Associate Vice President for Strategic Partnerships and Government Relations, Associate Vice President for Public Affairs, and the Board Secretary.

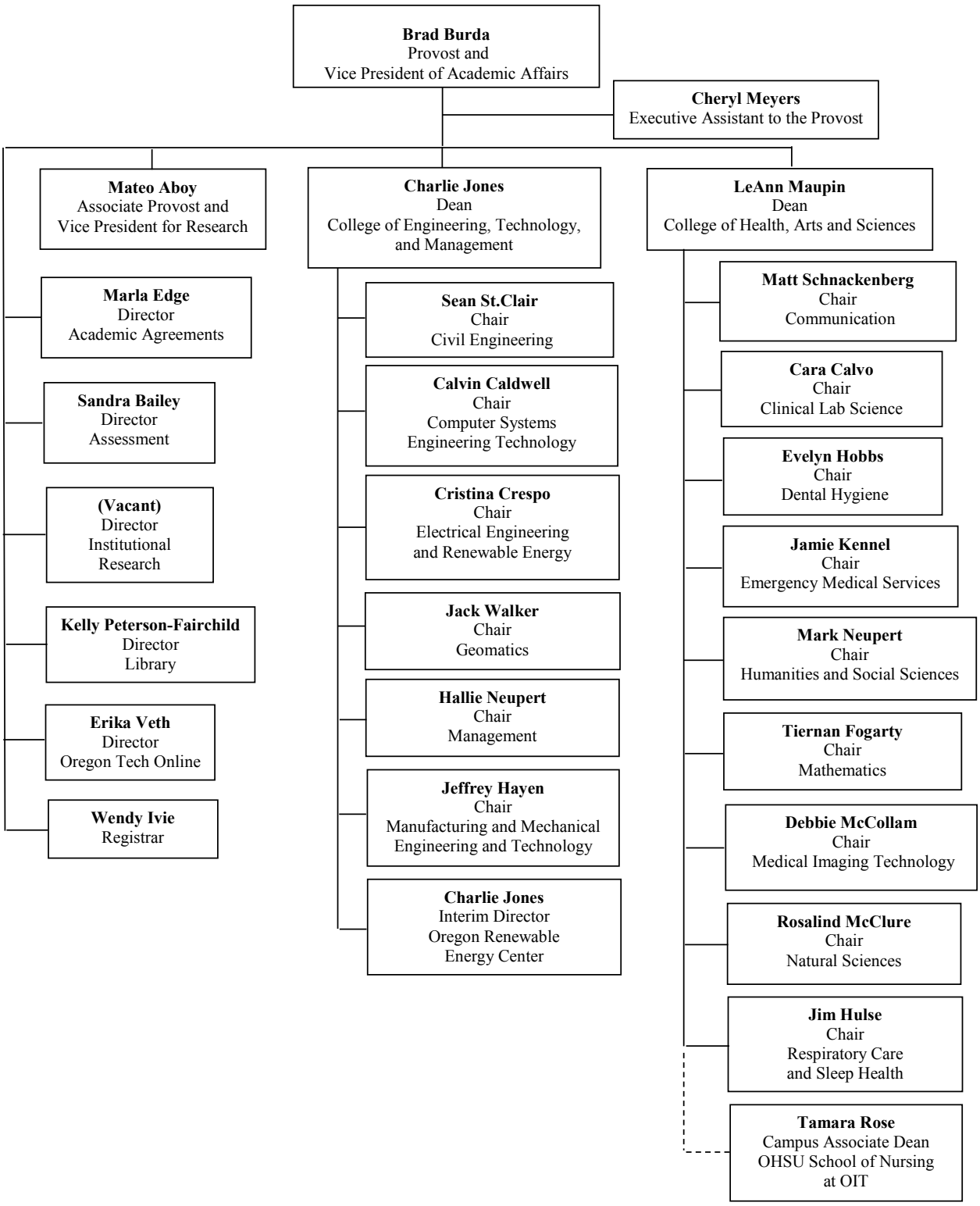
There are two colleges, each headed by a dean: College of Health, Arts and Sciences, and College of Engineering, Technology and Management.

Director-level positions include Registrar, and the Directors of Academic Agreements, Admissions, Business Affairs, Campus Life, Financial Aid, Housing and Residence Life, Integrated Student Health Center, Library, Online Learning, Student Success Center.

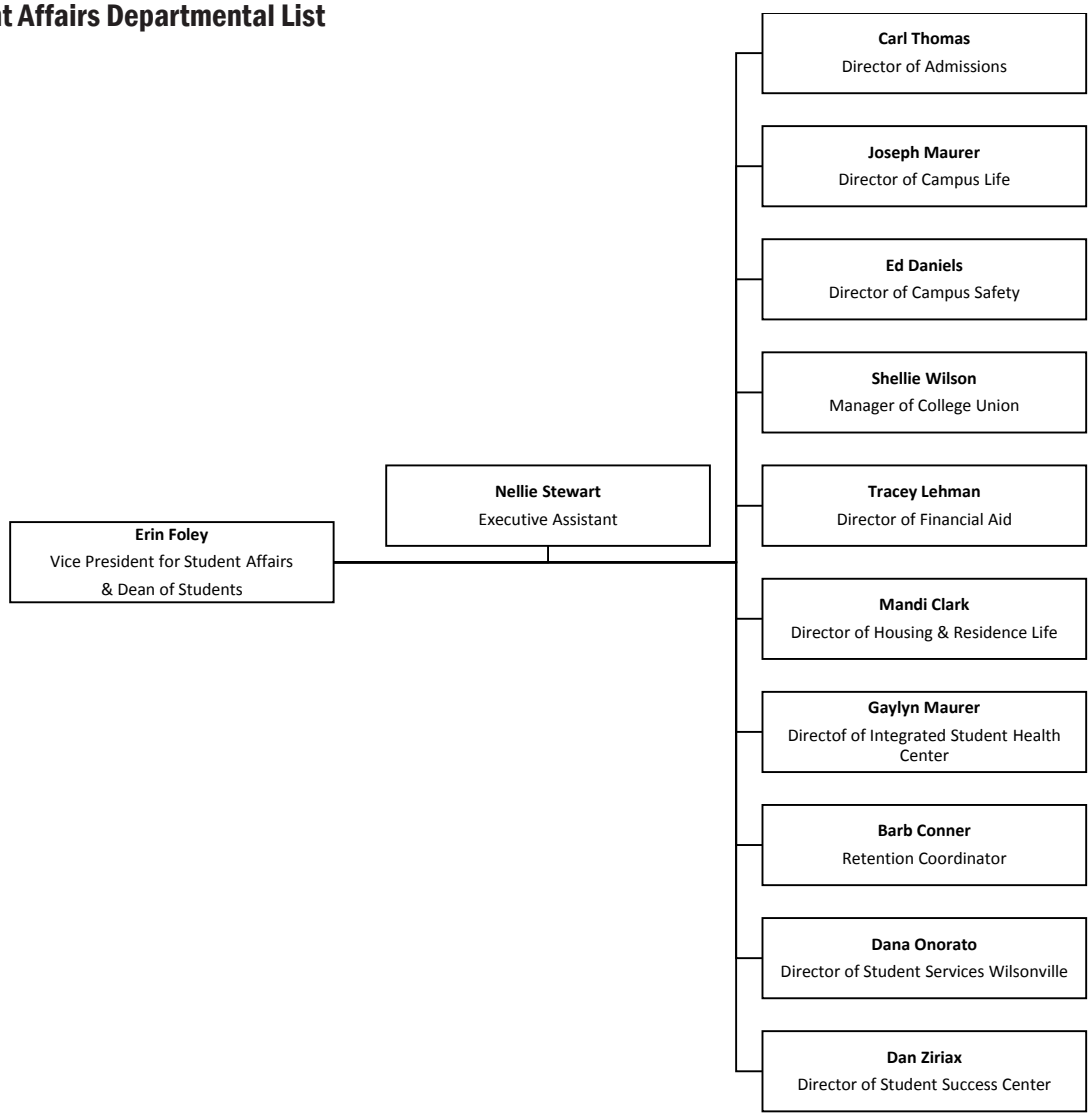
President's Office Organizational Chart



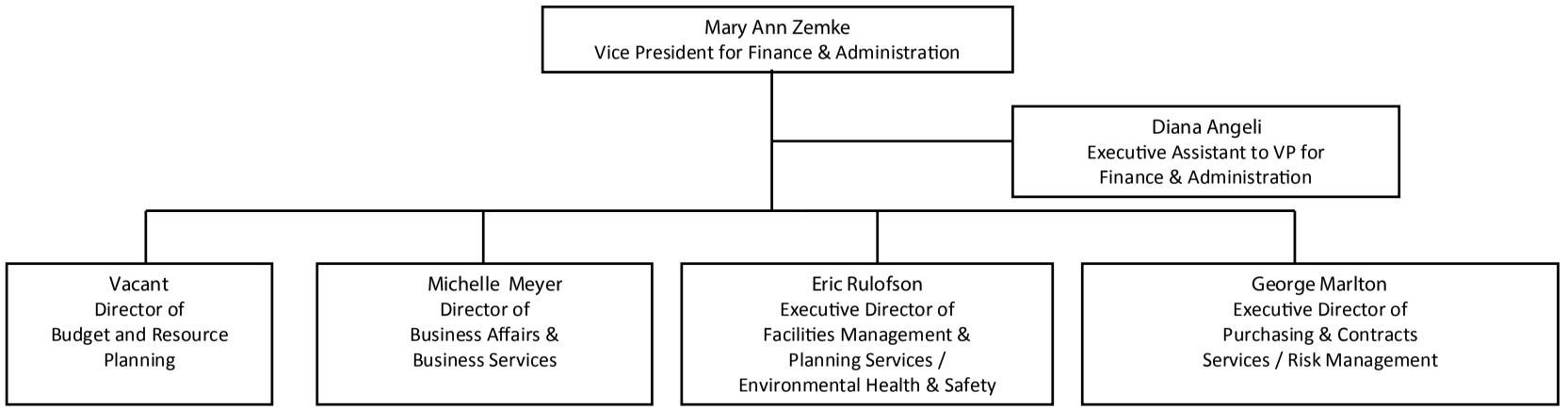
Provost Office Organizational Chart



VP Student Affairs Departmental List



VP Finance and Administration Organizational Chart



Finance and Administration (Operational Responsibilities 2014-2015)

Office of Facilities Management Services

- Custodial Services
- Code Compliance
- Construction Project Management
- Environmental Health and Safety
- Facility Planning
- Grounds & Landscaping
- Maintenance Services
- Operations and Maintenance of University Property
- Surplus Property

Office of Business Affairs

- Accounts Payable and Travel
- Accounts Receivable
- Audits
- Auxiliary Accounting
- Bookstore & Document Resource Center Administration
- Business Process Analysis and Training
- Cash Control
- Debt
- Financial Aid Accounting
- Financial Analysis
- Financial Policies and Procedures
- General Ledger Maintenance
- Grants Accounting
- Mail Services
- Payroll
- Procurement Card Administration
- Student Loans
- Vendor Maintenance

Office of Budget and Resource Planning

- Budget Analysis
- Budget Planning and Forecasting
- Budget Preparation
- Fiscal Impact Analysis
- Position Management
- Variance Reports

Office of Procurement and Contract Services

- Capital Construction Retainer Program Administration
- Clinical Affiliation Agreements
- Contracts
- Legal Services Administrator
- Procurement

Office of Risk Management

- Claims Investigation and Administration
- Insurance Portfolio Management
- International Travel
- Loss Control Plans
- PURMIT Trustee
- Risk Assessment, Reporting and Training

D Executive Staff and Leadership Profiles

Chris Maples

President

Klamath Falls Campus

Professional Details:

Dr. Chris Maples, who became Oregon Institute of Technology's sixth President in October 2008, believes that a large part of his job as president is to actively work and advocate for the students, faculty, and staff of Oregon Tech. Dr. Maples maintains open communication with students, faculty, staff, alumni, and friends of Oregon Tech, and schedules time to walk around all of the Oregon Tech campuses to visit with students, staff, and faculty. He has an open-door policy, and frequently can be found participating in campus happenings such as carrying armloads of student belongings during Residence Hall move-in day, playing the role of patient for Medical Imaging and Dental Hygiene students, and even taking the occasional pie-in-the-face for a good cause.

Before joining Oregon Tech, Dr. Maples served as visiting faculty at the University of Wisconsin-Madison and at Clemson University; worked for 11 years at the Kansas Geological Survey, the last three of which were spent on leave to serve as a program director with several different programs at the National Science Foundation; and was department chair in geological sciences at Indiana University before moving to Nevada to work at the Desert Research Institute in 2003. Dr. Maples was executive vice president for research at DRI immediately prior to his appointment at Oregon Tech. Being a scientist, Dr. Maples' interests in his field range from echinoderm and trace-fossil paleontology to geoinformatics and paleobiogeography. He also has worked on best-management practices for curation, management, and preservation of scientific data. He has numerous scientific publications and presentations based on fossils collected from many parts of the world, including desert areas in China and Iran. In addition, he has served on numerous external-review and NSF proposal-review panels, as well as holding various professional society offices.

Education:

- BS Geology, West Georgia College (now State University of West Georgia)
- MS and PhD Geology, Indiana University (paleontology), and Minor in Biology

EXECUTIVE STAFF *(In alpha order)*

Mateo Aboy

Associate Provost and Vice President for Research; Professor (Tenured)

Wilsonville Campus

Professional Details:

Dr. Mateo Aboy has served as Associate Provost and Vice President for Research at Oregon Tech since November 2011, and serves as the chief academic and chief operating officer for the Oregon Tech Wilsonville Campus. He was the founding Vice President for the Wilsonville Campus, developing and executing an academic strategy designed to transform the Oregon Tech Portland extension operations into an urban, industry-focused campus with over 800 students enrolled in high-demand BS and MS degrees. As the VP for Research, Dr. Aboy promotes and oversees sponsored projects, innovation, and technology transfer at all Oregon Tech campuses. He founded and currently oversees the Office of Innovation & Tech Transfer (OITT) and the Office of Sponsored Projects & Grants Administration (SPA).

Dr. Aboy joined the faculty at Oregon Tech during the 2004-05 academic year as a Program Director for the Electronics program in Portland. Under his leadership as the Electrical Engineering & Renewable Energy (EERE) Department Chair (2008-2012) and as a Portland Program Director (2005-2008), the EERE Department achieved significant strategic objectives, transforming from a technology department with a single program (BSEET) to a multidisciplinary engineering department offering full engineering degrees including a BS in Electrical Engineering, a BS in Renewable Energy Engineering, and a MS in Renewable Energy Engineering. During his tenure, the EERE department experienced remarkable growth, nearly doubling the overall student enrollment at Oregon Tech Portland Operations. While at Oregon Tech he has taught over 130 courses, helped secure funding through grants in excess of $3.0 million, published over 100 scholarly articles, and invented or co-invented over 30 patented or patent pending inventions. Dr. Aboy is a recipient of the 2013 Portland Business Journal 40 under 40 Award and Oregon Tech's Faculty Achievement Award, Intel Faculty Fellow Award, and the Oregon Tech Faculty Achievement Award.

Education:

- PhD, Electrical Engineering, ETSET, University of Vigo, Spain
- MS, (DEA) Telecommunications Engineering, ETSET, University of Vigo, Spain
- MS, Electrical & Computer Engineering, CECS, Portland State University, OR
- Ing, (Engineer) Telecommunications Engineering, MEC, Spain
- BS, Electrical Engineering, CECS, Portland State University, OR
- BS, Physics with Minor in Mathematics, Portland State University, OR
- MBA, International Management, RHUL, University of London, UK
- Prof. Cert., Sustainable Energy Conversion and Storage, Stanford University, CA
- Exec. Cert., Management & Leadership, MIT Sloan, Massachusetts Institute of Technology
- Cert., Strategy, Financial Analysis, Technical Management, MIT Sloan, MIT, MA, US
- Law Degree, Professional QLD, LLB in English Law, UCL/ULLS, University of London, UK
- Cert., Negotiation & Leadership, Harvard Law School, Harvard University, MA, US
- Law (Contract, Tort, Trusts, Land, EU Law), Faculty of Law, University of Cambridge, UK, EU
- RPA, Registered Patent Agent, United States Trademark & Patent Office, VA, US
- CLP, Certified Licensing Professional, Licensing Executives Society, VA, US

Brad D. Burda

Provost and Vice President for Academic Affairs

Klamath Falls Campus

Professional Details:

Brad Burda was appointed to the position of Provost and Vice President for Academic Affairs at Oregon Tech in November 2009 after having served as Acting Provost for more than a year, and after a distinguished career at Oregon Tech that spanned 26 years. Provost Burda is the chief academic officer of the university. The Provost is responsible to the President for all activities and supporting resources relating to curriculum, teaching, scholarship, outreach, planning and fiscal management. The Provost is responsible for managing the Institute in the absence of the President.

The Provost provides creative and effective leadership in maintaining the tradition of excellence in teaching and currency of subject matter in engineering, technology, and health-related programs. He fosters the collegial atmosphere and scholarly productivity of the Institute. He is responsible for delivering education throughout Oregon to meet the various needs of diverse populations.

Provost Burda directly supervises the Associate Provost and Vice President for Research (WILS); the Associate Vice President for Strategic Partnerships and Government Relations; the Dean of Engineering, Technology, and Management; the Dean of Health, Arts and Sciences; the Director of Online Learning; the Registrar; the Director of the Library; the Director of Assessment; the Director for Academic Agreements; and, the Director for Institutional Research.

Brad joined Oregon Tech in March 1983 as assistant professor of physics, promoted to associate professor in 1992 and full professor in 1996. He authored two physics laboratory manuals and co-authored one physics manual. Brad has served in many leadership roles on campus, including department chair of the Natural Sciences Department and Dean of the College of Health, Arts and Sciences. He served as Faculty Senate President from 1993-1995 and 2003-2006; Chair, Promotion Advisory Council, 2002-2003; Chair, Curriculum Planning Commission, 2002-2003; Chair, Faculty Compensation Committee, 2006-2007; and, Chair, Fiscal Operations and Advisory Council, 2005-2007. Brad was honored as the recipient of the Faculty Achievement Award in 2003.
Brad served on the Steering Committee of the Oregon Joint Boards of Education to develop a plan for applied baccalaureate degrees in Oregon, culminating in *House Bill 3093: Report to the Oregon Legislature – Applied Baccalaureate* (2009-2010).
In July 2010, Brad was appointed by Chancellor Pernsteiner to serve on the Joint Boards' Articulation Commission as the Provosts' Council representative (July 2010-June 2012) and served on the OUS Excess Credits Policy Work Group in 2012-2013.
He is currently serving on the OHSU Rural Campus Leadership Committee and Workforce Gaps Group and the Outcomes Based Funding Technical Workgroup.

Education:

- MS Physics, California State University Long Beach
- BS Dual majors in Physics and Mathematics, Iowa Wesleyan College

Robyn Cole

Oregon Tech Faculty Senate President, Program Director Diagnostic Medical Sonography

Klamath Falls Campus

Professional Details:

Robyn joined the faculty at Oregon Institute of Technology in 2004 teaching Diagnostic Medical Sonography within the Medical Imaging Department. She has been serving as the Program Director of OIT Diagnostic Medical Sonography program since 2010. Robyn has been involved in virtually all aspects of ultrasound including partnering with industry health care providers, lecture symposiums, and contributor to published scientific papers. She started her career as an Almunus of OIT's Diagnostic Medical Sonography program, fulfilling her externship requirement in Walla Walla, Washington. After graduation she was employed at Rogue Valley Medical Center, Medford, OR and then St. Charles Medical Center, Redmond, OR. Robyn is ARDMS Registered in Abdomen, OB/GYN, Breast, and Vascular Technology. Robyn is currently serving as the Oregon tech Faculty Senate President. The Faculty Senate of Oregon Tech maintains the institutional philosophy of shared governance characterized by open and responsible communication, fair treatment of individuals, participatory processes, and collaborative decision making, whereby each member of the faculty has the responsibility to speak and the right to be heard without prejudice. She supports this governance philosophy, with the active support of the faculty, provides a climate in which ideas can be initiated, policies and practices can be tested, and a unity of purpose can be forged so that all members of the college community are encouraged and supported in their endeavor to contribute to the mission of Oregon Tech.

For fun, Robyn is an outdoor enthusiast and busy mother of two girls. The best part of her job is continuing a lifelong learning and encouraging students to pursue academic goals.

Education:

- BS Diagnostic Medical Sonography, Oregon Institute of Technology, Klamath Falls
- MS Information Technology Management, Western Governors University
- ARDMS Registered in Abdomen, OB/GYN, Breast, and Vascular Technology

Lita Colligan

Associate Vice President for Strategic Partnerships and Government Relations

Wilsonville Campus

Professional Details:

Lita Colligan joined Oregon Tech in October 2007, as Associate Vice President for Strategic Partnerships. Lita is responsible for building partnerships between the university and industry to ensure that students are prepared for real-world jobs. Lita is one of the conveners of the South Metro-Salem STEM Partnership, a collaborative of 15 school districts, 6 higher education institutions, 11 industry partners and 9 community organizations, with the vision to catalyze Oregon students to achieve STEM degrees and certificates. Lita is also a member of the public university Legislative Advisory Council and supports President Maples' advocacy for Oregon Tech and its students' interests in Salem and Washington D.C.

Prior to joining Oregon Tech, Lita was Oregon Governor Kulongoski's Workforce Policy Advisor. Ms. Colligan's primary responsibility was developing policies and programs to fulfill the Governor's vision to increase access to high-quality education and skills training to drive Oregon's economic growth. She focused primarily on the manufacturing, healthcare and renewable energy industries. As Advisor, Lita was instrumental in the development of the Governor's workforce strategic plan, Winning in the Global Market, that creates a vision and strategies for a highly skilled workforce and globally competitive companies in Oregon.

Lita has worked in government, not-for-profit and private sector organizations in the fields of workforce training, communications, publishing and marketing for 30 years. She is a trained mediator and has been an active volunteer in small claims court mediation, and in her children's schools and school foundations.

For fun, Lita is a hiker, gardener, runner, bicyclist, and photographer. The best part of her current job is working with amazing and innovative students and faculty at Oregon Tech.

Education:

- BA in Politics, University of California, Santa Cruz; College Honors
- Certification in Project Management from PSU; Trained mediator

Krista Darrah

Executive Director, Oregon Tech Foundation

Klamath Falls Campus

Professional Details:

Krista Darrah has been a dynamic team member of Oregon Tech since joining the university in 2006 to manage the accounting and finances of the Oregon Tech Foundation. Darrah has served as the Foundation's accounting manager, Foundation's interim executive director, Assistant Director of Business Affairs, and Director of Budget.

The Oregon Tech Foundation is a 501(c)(3) charitable organization and is the charitable arm of Oregon Institute of Technology, which Ms. Darrah currently serves as Executive Director of. Darrah provides overall strategic and operational responsibility for the Foundation's execution of its mission, programs, expansion, financial objectives, and tax-exempt status. Responsibilities include oversight of all accounting-related functions of the Development office at Oregon Tech, monitoring and identifying weaknesses in internal controls, reconciliation of all general ledger accounts, participation and coordination of the annual independent audit, reporting financial information to executive staff and board of directors, ex-officio board director for Oregon Tech Foundation, and working with the Foundation's finance committee on investment management and oversight.

Prior to Oregon Tech, Ms. Darrah served as the comptroller at Klamath Community College for three years where she made substantial changes in business processes that increased efficiency and productivity while significantly lowering the rate of error through system changes and office reorganization. Darrah also worked for JELD-Wen, Inc. as group controller where she oversaw between 13-19 subsidiaries and was responsible for financial reporting, internal controls, and budgeting. During her five years at JELD-Wen, Inc. Darrah worked with many different groups as she was frequently reassigned within the accounting department because she was one of their go-to people to handle various situations.

Education:

- BS Management Information Systems/ Management Accounting option, Oregon Institute of Technology

Erin Foley

Vice President for Student Affairs and Dean of Students

Klamath Falls Campus

Professional Details:

Erin joined Oregon Tech in April 1999 as the director of Housing and Residence Life and then added the position of director of the College Union shortly thereafter. During this time, Erin was also the assistant coach for the women's soccer team (1999-2001) which was the beginning of the soccer program at Oregon Tech. Erin became the Dean of Students in 2005 (while still holding the two director positions) and Vice President for Student Affairs in January 2009 (only retaining the Dean of Students role). Erin has also served in the role of interim director for the student health center (twice since 2010) and has occasionally taught algebra on campus.

Prior to Oregon Tech, Erin was the store manager for her family's ACE Hardware store in Phoenix, Arizona (1996-1999). Erin has worked in higher education for over twenty years and enjoys interacting with students in a variety of ways day in and day out. Traveling is a significant interest and Erin has joined the Oregon Tech Engineers Without borders student chapter the last three summers to Tanzania to work on a slow sand water filter.

Education:

- BS Dietetics, University of Arizona
- MA in College and University Administration, Michigan State University
- PhD in Higher Education Administration, Indiana University, Bloomington

Sandra Fox

Board of Trustees Secretary

Klamath Falls Campus

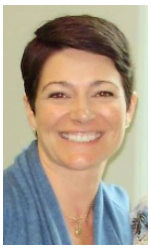
Professional Details:

Sandra joined Oregon Tech in December 2014 as the first Board of Trustees Secretary. Her responsibilities involve high-level facilitation and coordination of the activities of the Board of Trustees, President's Office, and Executive Administration. Sandra supports the work of the Board, its officers and committees, maintaining primary responsibility for all Board meeting preparation, staffing, and orientation. She also creates and retains permanent records of all Board activities and serves as custodian of institutional policies and standards adopted by the Board and President.

Prior to joining Oregon Tech, Sandra worked for the City of Klamath Falls for 16 years. She began as a land use planner, and worked her way up to her most recent position as the community development director. She enjoyed working with a wide variety of organizations and individuals to better the community, including volunteering as an adjunct professor for the civil engineering senior project. Prior to moving to Klamath Falls Sandra worked for the County of San Luis Obispo, California as the Park Planner. She is a member of the Basin Transit Service board and the Crater Lake Natural History Association.

Education:

- BS Landscape Architecture, Cal Poly State University San Luis Obispo
- MBA, Agricultural Business Specialization, Cal Poly State University, San Luis Obispo



Tracy Ricketts

Associate Vice President of Development and Alumni Relations

Klamath Falls Campus

Professional Details:

Tracy Ricketts joined Oregon Tech in February 2010 as Alumni Relations Manager, and has since transitioned through several roles within the Development Team. She manages all strategies and efforts related to fundraising and alumni relations and works with the development team to and Oregon Tech Foundation board of directors to share the Oregon Tech story and increase pride in and support for the university.

Prior to joining Oregon Tech, Tracy spent a year and a half volunteering for the Klamath Animal Shelter as the Fundraising Coordinator, working on completing the new shelter, establishing a social media presence and creating events and communications plans to increase funding and awareness of need. Tracy was a top real estate broker for JELD-WEN Communities (2001-2008), where she developed many long-term relationships with community members who have since become fans of Oregon Tech. Prior to moving to Klamath Falls in 2001, Tracy worked overseas in sales and marketing.

Education:

BS Political Science, University of Oregon

Diane "Di" Saunders

Associate Vice President Communications & Public Affairs

Wilsonville Campus

Professional Details:

Diane "Di" Saunders joined Oregon Tech in July 2014 as Associate Vice President for Communications and Public Affairs. She manages the university's external and internal communications strategy and implementation efforts, working as a team with her colleagues in Marketing/Communications Department, and with faculty, staff, and students to effectively communicate Oregon Tech's mission, programs, and new ventures. Besides working to "operationalize" communications across Oregon Tech's campuses and sites, Di is also helping to prepare the campus community for its new Board of Trustees, who will be officially charged with governing Oregon Tech on July 1, 2015.

Prior to joining Oregon Tech, Di was Director of Communications for the Oregon University System and the State Board of Higher Education for almost 12 years (2002-2014) where she managed internal and external system-level communications and public outreach activities, working with all seven of the public university campuses, their presidents and leadership. Prior to returning to Oregon, Di was Vice President for Communications & Public Affairs at the Nellie Mae Education Foundation in Boston (1999-2002), serving as the founding executive staff member, and instrumental in developing the philanthropy's giving approach and establishing it in the Boston foundation community. Prior to this, Di served as Vice President for Communications & Public Affairs at Nellie Mae Student Loan Corporation (1987-1999), the nation's largest nonprofit education loan provider at the time, with a $2 billion student loan portfolio. Besides the normal duties in her Communications/Marketing/Public Affairs portfolio Di also worked extensively in the area of student loan debt management and research, extending the reputational capital of the organization through extensive public service outreach, including numerous national television and other media appearances and speaking engagements. Di worked internationally in Botswana, Africa from 1981 to 1987, first as a secondary school English teacher in the Peace Corps, and later as a private consultant for the Ministries of Education and Local Government and Lands.

Education:

- BA English, Secondary Education Teaching Certificate, Portland State University, OR
- MS Communications Management, Simmons College, Boston

Mary Ann Zemke

Vice President of Finance and Administration

Klamath Falls Campus

Professional Details:

Mary Ann Zemke serves as the chief fiscal and administrative officer of the univeristy and is the President's key executive regarding the University's fiscal and administrative operations. The VP reports directly to the President and is a member of the executive team and President's Cabinet. The VP oversees four directors which includes the Director of Business Affairs; Director of Budget & Resources Planning; Executive Director of Facilities Management Services and Executive Director of Procurement & Contract Services/ Risk Management. The VP is responsible for a wide variety of financial and administrative areas for the university which include financial reporting and forecasting, accounting transactions, business process, budget development and planning, internal accounting and financial controls, cash management, internal financial reviews and audits, grant account, auxiliary accounting, procurement of services and goods, contract development and management, risk management, environmental health and safety, physical facilities, oversight of design and capital construction, campus sustainability programs, real estate and leases; and ensuring policy compliance and strategic planning.

Mary Ann has a total of 32 years' experience in Accounting, Finance and Administration, with 22 of those years are with Higher Education. Before coming to Oregon Tech, Zemke's career included 9 years in public accounting and a year as controller with a manufacturing entity. She also spent 14 years at Indiana University South Bend, in the roles of Vice Chancellor of Finance and Administration, Assistant Vice Chancellor of Finance and Administration, and Director of Accounting and Budget, She was the first female appointed to the Vice Chancellorship in the Indiana University system. Mary Ann also assisted President Martha Ann Dow with the financial oversight for the Center for Health Professions Campaign. Her current positon at Oregon Tech began July 2009.

Education:

- MBA, Concentration Accounting and Management, Western Michigan University
- B.A. Political Science, Concentration Public Administration, Western Michigan University
- Credentials: Certified Public Accountant (CPA)

E Oregon Tech Strategic Plan

Oregon TECH

Oregon Tech 2020:
Strategic Action Plan

OREGON TECH VISION

Oregon Tech will be a nationally recognized public polytechnic university delivering in-demand, industry-focused degrees and graduates ready to meet workforce needs in Oregon and the Northwest.

OREGON TECH MISSION

Oregon Institute of Technology, the Northwest's premier public polytechnic university, offers innovative and rigorous applied-degree programs in the areas of engineering, engineering technologies, health technologies, management, and the arts and sciences. To foster student and graduate success, the university provides an intimate, hands-on learning environment, focusing on application of theory to practice. Oregon Tech offers statewide educational opportunities for the emerging needs of Oregon's citizens, and provides information and technical expertise to state, national, and international constituents.

Core Themes

- Applied Degree Programs
- Student and Graduate Success
- Statewide Educational Opportunities
- Public Service

STRATEGIC PLAN PURPOSE

Oregon Tech's 2020 Strategic Action Plan documents goals, objectives and actions, built collectively by university stakeholders over the last few years, and serves as a 5-year roadmap to guide our trajectory of student, university and community success. It builds upon previous goals and actions taken by the university, and moves the campus forward to address the changes in and challenges of higher education in the state, region and nation. We will have advanced our strategic vision if we are:

- **Growing and transforming** to meet the needs of the State of Oregon, as its demographics and industry needs change and intersect over time.
- Focusing on and **expanding access for Oregon students** – particularly those who face significant barriers – to meet our 40-40-20[1] obligation and ensure that Oregonians are not left behind; and successfully advocating for the financial resources to ensure students can be supported to stay in college and earn a degree.

[1] 40% of Oregon's population will have at least a bachelor's degree, 40% will have a meaningful certificate or associate's degree, and the remaining 20% will have at least a high-school diploma or equivalent by 2025.

- Operating with **diversified financial resources** that respond appropriately to permanent and temporary shifts in funding sources, while maintaining student affordability and ensuring fiscal stability.
- Creating new and delivering existing applied-degree **programs that are affordable, responsive to industry and student demand**, and meet graduate success targets; and reducing or eliminating programs that do not meet these requirements.
- Building and maintaining **state-of-the-art labs and classrooms** to ensure that our graduates are learning in the same environments and on the same sophisticated equipment that they will encounter in high-tech and healthcare workplaces.
- Advancing the **diversity of our faculty ranks** through success tracks that continue the focus on teaching, and also add an *option* for a "scholarship" track inclusive of applied research with a student engagement component.
- Advancing the **diversity of Oregon Tech staff and faculty** through innovative hiring practices, professional development and the overall inclusive university environment.
- Offering a **safe campus environment** for our students, faculty and staff, and an open and welcoming environment for our community neighbors that reflects our philosophy of engagement, equity, passion for intellectual pursuits, and public service.
- **Leveraging all the assets** of Oregon Tech: A rural residential campus in Klamath Falls (Oregon Tech Klamath Falls), a non-residential urban campus in Wilsonville (Oregon Tech Wilsonville), an online campus (Oregon Tech Online), and extension operations (Oregon Tech Extension).
- Successfully launching Oregon Tech's **new Board of Trustees** and initiating a new governance structure for Oregon Tech that accelerates our ability to meet our mission-related goals and objectives.

BACKGROUND AND CONTEXT

This plan has been collectively developed in the context of several considerations: Oregon Tech's 67-year history as an Oregon public institution serving student, industry and state needs; our unique degree options delivered by an outstanding and dedicated faculty and staff; and our challenges of constrained state funding, needed diversification of operating revenues, and a restructured higher education system in Oregon.

Our primary assets lie in the quality programs we offer and the students those attract; and the way we deliver those to students through our committed faculty and staff. Oregon Tech's reputational capital is built on our basic philosophy of hands-on polytechnic education where students learn in a real-world environment; as well as our contributions to rural Oregon, to industries' talent needs, and to the state's high-tech and healthcare growth sectors in the suburban areas outside of Portland.

As we collectively communicate who we are and what we do, our terms tell others that:

- **Relevant** means that what students are learning can be directly applied to their current or future job, actually building their resume *before* they graduate.
- **Hands-on** means that students are *doing* not just studying theory about a subject area, and are in the small classes that enable them to practice the skill through project-based learning with the guidance of a professor practitioner.
- **Polytechnic** implies technical, applied and industry-related degree areas that uniquely respond to market needs, including balancing program enrollment with the size and scope of the job market; having a measurable return on investment (ROI) for students, balancing their costs of attendance with their financial and professional career goals and gains.
- **Real world** means that the university is providing experiences and skill sets learned in labs, internships and externships that put the student into the job site doing the same work that they will experience after graduation, all of which make graduates globally competitive professionals on Day 1. In short: *real* skills for *real* jobs in the *real* world.

STRATEGIC GOALS

Each strategic goal summarized below is supported by its own rationale, objectives and approaches in the next section.

#1: ***Student Success***

Deliver applied, hands-on educational experiences that provide students with the technical, critical-thinking, and communication skills needed to succeed in and contribute to their chosen fields.

#2: **Faculty and Staff Success**

Attract and retain first-rate faculty and staff who are passionate about teaching and the student-focused educational mission of the university to graduate globally competitive professionals, as well as engage in industry outreach, scholarship and service to the university.

#3: **Economic and Workforce Connections**

Contribute in significant ways to Oregon's competitive strength, global-market advantage, and diverse industries by preparing new generations of engineering, technology, allied-health, management and applied arts and sciences professionals through Oregon Tech's applied degree programs.

#4: **Student Access and Diversity**

Improve student educational access, the university environment and employment opportunities for diverse and historically underserved populations in Oregon, in order to ensure equity in our provision and delivery of education, and to lead and serve as a community example and resource for an inclusive, diverse campus environment in all respects.

#5: **University Financial Success**

Manage university fiscal, capital and physical resources to sustain and enhance financial viability, and allow Oregon Tech to invest in new opportunities that serve our students and mission, prepare us for unanticipated events, and maintain and improve the quality of our programs, human resources, and public mission.

RATIONALE, OBJECTIVES AND APPROACHES

Goal #1: Student Success

Deliver applied, hands-on educational experiences that provide students with the technical, critical-thinking, and communication skills needed to succeed in and contribute to their chosen fields.

Rationale:

As the state's public polytechnic university, Oregon Tech is committed to educating Oregonians for successful high-wage technical and health-professional careers. We do this in an efficient, affordable manner, while maintaining the high-quality, supportive, hands-on undergraduate-focused education that has become the hallmark of Oregon Tech.

Objectives:

I. Maintain a graduate success rate[2] of 90%+ annually.

II. Improve student retention and graduation rates by increasing the number of pathways to and options for relevant and applied degrees and certificates, including offering more sophomore- and junior-year options for changes in majors, and providing comprehensive, targeted student-support services from staff and faculty at every step along the way.

III. Enhance the quality and number of student internships and externships by increasing industry partners and the number of field opportunities in order to enrich student applied, real-world, preparatory experiences in their chosen fields, and ensure that students have the experiential learning needed to ensure a 90%+ rate of post-graduate success.

Approaches:

A. Increase offerings of majors, minors, and certificates through various means (e.g., co-located campuses, online offerings, etc.) for students to achieve their degrees more efficiently, thereby making an Oregon Tech education more achievable in a timely manner, increasing value and affordability, in addition to getting students into the workplace more quickly to meet state economic needs.

[2] Graduate Success Rate is defined as the percentage of Oregon Tech graduates in jobs or graduate/professional schools within six months of their graduation date from Oregon Tech, as determined by survey responses.

B. Maintain the in-class student-to-faculty ratio at low levels of 20:1 or less to maximize the quality of learning, the overall undergraduate experience, the distinctiveness of an Oregon Tech education, and student retention on our campuses.
C. Increase the number and variety of dual-enrollment, transfer, prior-credit, and other credit-counting opportunities for students to improve retention, shorten their time to degree completion and decrease their overall cost of attendance.
D. Build on and enhance current student-life opportunities on our campuses – including opportunities for undergraduate residential experiences – and focus on building and enhancing a deeper, more meaningful tie between the university and all of our students, irrespective of where they are or how they are enrolled (i.e., enhance university-value connections).
E. Expand collaborations with community colleges and pre-college school districts throughout Oregon (e.g., South Metro-Salem STEM Partnership, Klamath Promise) to increase the numbers and diversity of students prepared for the STEM (Science, Technology, Engineering, and Math) degrees that form the core of a polytechnic university, and which provide value to graduates, the workforce, and Oregon's economy overall.

Goal #2: Faculty and Staff Success

Attract and retain first-rate faculty and staff who are passionate about teaching and the student-focused educational mission of the university to graduate globally competitive professionals, as well as engage in industry outreach, scholarship and service to the university.

Rationale:

Through the strength of shared governance, partnerships, and education delivery, the core of a university lies with its faculty and staff. Faculty and staff conduct the day-to-day business of the university, and are responsible for helping students achieve success through on-time graduation with appropriate preparation for their post-graduate careers. Faculty and staff must be supported in comprehensive ways so that all are engaged in the overall university direction, quality, and student-achievement goals. Retention of high-quality faculty and staff and the provision of professional development opportunities serve to build an increasingly high-quality university that has the ability to adapt to the realities of changing student demographics and market needs over time.

Objectives:

I. Build and support different tracks for faculty and staff to broaden professional opportunities, improve their retention and work environment, and meet other campus goals, such as revenue diversification and student engagement

II. Increase recruitment and retention of diverse faculty and staff through inclusive approaches throughout the employment process.

Approaches:

A. Develop: (1) different faculty tracks that emphasize teaching and scholarship/ applied research (e.g., lecturers, instructors, research faculty, clinical faculty, professors of practice, research professors, etc.); (2) different hiring tracks that allow for a range of employment percentage (e.g., part-time faculty, adjunct faculty, two or more faculty members sharing a single faculty line, etc.); (3) flexible work schedules and locations (e.g., differential loads in different years or terms; including summer as one of three terms taught, with either fall, winter, or spring off), to the extent allowable; and (4) creating opportunities for advancement and professional development across departments.
B. Provide competitive compensation packages for faculty and staff, as well as a welcoming, open, work environment, by building a fiscal profile that includes revenues from new sources, and redirection/realignment of revenues when possible.
C. Facilitate more effective teaching and learning opportunities for faculty and staff, including: (1) faculty and staff exchanges, (2) staff and faculty shared among two or more campuses or institutions, (3) other opportunities for faculty and staff to enhance their own teaching/learning experiences as they increase learning opportunities for our students.
D. Provide additional support for faculty and staff achievements, including: (1) funding for professional-development opportunities, (2) a supported environment in which to innovate, and (3) recognition and celebration of individual and group achievements.
E. Extend programs and activities that ensure a welcoming, inclusive, and open work environment for all faculty and staff, which contributes to productivity, positive morale and career satisfaction.

Goal #3: Economic and Workforce Connections

Contribute in significant ways to Oregon's competitive strength, global-market advantage, and diverse industries by preparing new generations of engineering, technology, allied-health, management, and applied arts and sciences professionals through Oregon Tech's applied degree programs.

Rationale:

Oregon Tech has risen to prominence in Oregon and the nation through its emphasis on real-world, problem-solving, career-focused education, and its reputation for producing students who are ready for post-graduate careers and/or additional post-graduate education. Oregon Tech graduates will continue to benefit from the long-term, value-added components embedded in their educational experiences, and contribute to the State of Oregon's economy, through our staying true to our polytechnic mission and curricular approaches that are industry-focused and aligned with workforce needs.

Objectives:

I. Develop a university-wide Academic Master Plan by March 2015 that is reviewed annually, in order to keep current with students and employers' needs, and the requirements of accrediting groups and professional organizations.

II. Build upon our rigorous, practical, and supportive educational environment at Oregon Tech in order to impart these same qualities to our students and alumni, while also supporting retention of students through comprehensive academic assistance, enhanced student life, and other areas of student support.

III. Grow and expand Oregon Tech's urban and suburban presence along the I-5 corridor between Portland and Salem, including access for rural communities near the metro area.

IV. Grow and expand Oregon Tech's rural presence in southern Oregon, as well as our online presence, in order to reach as many rural Oregonians as possible.

Approaches:

A. Introduce new majors, minors, and certificates, as well as update or phase out less relevant majors, minors, and certificates – as the labor market changes – to continue our focus on student and graduate success while acting prudently within financial constraints; and work with the faculty Program Innovator Team (PIT Crew[3]), industry advisory groups and other relevant groups to determine short- and long-term program needs.
B. Expand partnerships with Oregon businesses, chambers of commerce, hospitals, and other entities to increase internships, externships, and career opportunities that improve retention of Oregon Tech graduates within the State of Oregon and build connections with our alumni.
C. Continue building mutually beneficial relationships – and our reputational capital – with industry, so that our graduates are in even greater demand, and our alumni accomplishments contribute to our reputation and university goals.
D. Integrate Oregon Tech's sustainability efforts across all aspects of the university enterprise (from teaching to research to outreach), particularly our unique generation of 100% clean, renewable geothermal and solar energy sources and uses in Klamath Falls, and our Renewable Energy Engineering Degree programs; and use this unique, sustainable asset to build partnerships with industry, integrate student research, attract external support, and build an international reputation for practicing the clean, green energy production and applied approaches that we teach in the classroom through all of our degree programs.

Goal #4: Student Access and Diversity

Improve student educational access, the university environment and employment opportunities for diverse and historically underserved populations in Oregon to ensure equity in our provision and delivery of education, and to lead and serve as a community example and resource for an inclusive, diverse campus environment in all respects.

Rationale:

[3] The charge of the Program Innovator Team (PIT Crew) is to support development of new programs through holistic planning and entrepreneurial resource allocation. Additional activities include: request and vet preliminary proposals for new programs; provide institutional support for program development – grant writing, recruiting preparation, industry outreach, workforce development, etc.; provide financial support for program development – stipends, supplemental funding to department S&S; provide continued funding and support for newly implemented programs; and develop a plan for evaluating PIT performance.

Diversity at Oregon Tech is inclusive of gender, racial, ethnic, religious, sexual orientation, socio-economic and geographic backgrounds, and other ways of assessing diversity, all of which are important to us. With diversity comes additional quality and perspectives for students, faculty, staff, and the surrounding community, teaching students in an environment that will reflect their life and work experiences while on campus and throughout their futures. In addition, the changing demographics of Oregon and the U.S., and our public university stewardship, make it imperative that we provide a means for access and success to the entire population. It is also contingent upon Oregon Tech to have diverse faculty and staff in order to build trust relationships, student confidence and pathways to success for a diverse student population.

***Objectives*:**

I. Increase the diversity of Oregon Tech's students to reflect the demographics of our campuses' regions and the State of Oregon, as recommended by Oregon Tech's Equity and Strategic Enrollment Management Committees. Develop comprehensive, measurable efforts to recruit, retain, and remove barriers for today's Oregon Tech students with diverse backgrounds and circumstances, including students of color; first-generation students; veterans; single parents; married students; former foster care youth; working adults; and others who do not fit the once traditional student profile of a recent high school graduate who is supported by parents/guardians.

II. Address the geographical backgrounds of Oregon Tech students and our communities by providing an added focus on rural needs, issues, and degrees at Oregon Tech's Klamath Falls campus, as well as additional co-location opportunities and online offerings that ensure rural access.

Approaches:

A. Earmark funds and other appropriate resources to expand recruitment, retention and support of underrepresented groups of students, faculty, and staff. Identify and apply for external funding that will provide additional targeted resources to meet the needs of diverse students, particularly in STEM fields.
B. Increase recruitment and retention of international students, faculty, and staff both to reflect the global environment in which our graduates will work, and to diversify tuition revenues in ways that benefit the entire university.
C. Provide additional resource support for high-need, student-support programs (e.g., Oregon Tech's federal TRIO program (Student Support Services), which targets underserved students) in order to improve the retention and success rates of these students; use proven approaches in campus retention programs; and replicate successful approaches in other campus retention programs.
D. Continue to enhance opportunities for diverse and local vendors in acquiring goods and services.

Goal #5: University Financial Success

Manage university fiscal, capital and physical resources to sustain and enhance financial viability, and allow Oregon Tech to invest in new opportunities that serve our students and mission, prepare us for unanticipated events, and maintain and improve the quality of our programs, human resources, and public mission.

***Rationale*:**

As Oregon's public polytechnic university, Oregon Tech has both an obligation and challenge to achieve financial stability and maintain viability in the face of changing economic and higher-education conditions. With decreasing state support and a growing reliance on tuition revenue to fund campus operations, Oregon Tech's financial future must be one that is more stable, more predictable, and more robust if we are going to continue to attract and retain the committed faculty and staff to deliver the affordable, high-quality, hands-on programs on which we have built our reputation. This requires needed investments in human resources, programs and facilities, and appropriate reserves to meet unanticipated and/or urgent campus needs that require capital outlays.

***Objectives*:**

I. Grow the enrollment of the university by ~1,000 students over the next 5 academic years (by Fall 2020) to reach total enrollment of 5,500, and over the next 15 years to more than 8,000 students, while firmly maintaining the intimate, hands-on experience that has been so crucial to Oregon Tech's success. This level of student enrollment will increase the number of graduates and alumni, and help stabilize university finances through both tuition and development efforts. Focus resources on student growth in four key areas: (1) the Oregon Tech Klamath Falls Campus; (2) the Oregon Tech Wilsonville Campus; (3) the Oregon Tech Online Campus; and (4) The Oregon Tech Extension Campus, i.e., co-located campuses and programs (e.g., Chemeketa Community College, Oregon Dental Service/EOU, Seattle Boeing).

II. Grow the Oregon Tech Foundation's endowment over the next five years by investing in new resources directed at increasing the percentage of alumni and other donors who contribute to Oregon Tech. This growth will leverage the success of our students, academic programs, graduates, and athletic programs, and in turn build a culture of giving that creates enhanced philanthropy and success.

III. Develop a university-wide Facilities Master Plan that is aligned with academic, operational and financial goals and resources; and which is reviewed on a biennial basis.

Approaches:

A. Continue to refine and implement a data- and mission-driven enrollment-management strategy for Oregon Tech that aligns with fiscal needs, and (1) strikes an appropriate balance of Oregon resident, non-resident and WUE[4] students, (2) meets diversity and equity goals, (3) targets retention priorities, and (4) increases graduation rates.

[4] WUE is Western Undergraduate Exchange in which students from western US states may attend a university in another western US state for 150% of that state's resident tuition rate.

B. Target resources and strategies on extending Oregon Tech's name, reputation, programs, and successes to a broader audience through development of a university-wide Marketing/Communications Master Plan that is reviewed and updated regularly, and through a comprehensive strategic approach to new program development and current program recognition and outreach.
C. Continue to develop and implement innovative cost-savings opportunities through: (1) shared services internally and with other university/college partners, (2) revision of obsolete, or redundant procedures, programs and workflow, (3) flexible employment, and (4) non-traditional partnerships with local communities.
D. Continue to ensure the financial integrity of the university through compliance, adherence to regulations and providing high service levels to students and the university community.
E. Engage alumni and supporters emotionally and physically, to build connections, pride, involvement, and financial support for students and the university.
F. Expand development and fundraising objectives and responsibilities to all levels of the university – including college, department, and program – in order to reach students at the point where their commitment and affinity to Oregon Tech is strongest. Provide university-wide resources and training to ensure that there is a consistent, concerted and effective approach that helps us increase and diversify financial resources.

IMPLEMENTATION PLAN

This university-wide strategic action plan is the roadmap from which the other campus action plans will be finalized and measured against for alignment. These other plans include:

- Academic (including sub-plans for academic departments)
- Finance, Administration and Facilities (including sub-plans for departments)
- Enrollment/Recruitment/Retention
- Student Affairs (including sub-plans for departments)
- Marketing/Communications/Public Affairs
- Athletics
- Board of Trustees
- Oregon Tech Foundation

Each university area should complete the planning process between March and May 2015, with implementation beginning to be staged in immediately thereafter, and in full force by the end of the Fall 2015 term.

Part of each of the strategic plans listed above will be a work/implementation plan that lists specific deliverables and approaches, resource needs, responsible lead parties, deadlines, and metrics or indicators against which each deliverable and objective will be measured. Modest funding will be available to help units complete and achieve their plans.

On an annual basis, each segment of the university will report on their progress, successes, challenges, and revisions to the plan based on what worked and what needs refining. These plans will also be aligned with and prioritized based on the university budget.

MOVING FORWARD

"It wasn't raining when Noah built the ark." ***--Howard Duff***

We are all aware of the need to change and adapt as environments and paradigms shift. We are also aware that being ahead of the change will put us in a better position to continue to meet our mission, sustain and grow this wonderful university that is doing such important work, and serve the students who select us for their post-secondary education.

This strategic action plan takes where we are today and what we are all engaged in, and further hones, targets and aligns our current state with our understanding of what the near future holds. As responsible stewards of the polytechnic educational future in Oregon and the Northwest, we must be prepared for challenging periods by building a strong, nimble university that won't require us to implement any number of crisis-management efforts.

Thank you all for your dedication to public education, and for making Oregon Tech the high-quality university that it is today.

# # #

September 18, 2014

F Oregon Tech Achievement Compact

Oregon Institute of Technology Mission:

Oregon Institute of Technology, a member of the Oregon University System, offers innovative and rigorous applied degree programs in the areas of engineering, engineering technologies, health technologies, management, and the arts and sciences. To foster student and graduate success, the university provides an intimate, hands-on learning environment, focusing on application of theory to practice. Oregon Tech offers statewide educational opportunities for the emerging needs of Oregon's citizens and provides information and technical expertise to state, national, and international constituents.

Mission Core Themes

- Applied degree programs
- Student and graduate success
- Statewide educational opportunities
- Public Service

Outcome Measures	***2010-11***			***2011-12 Projected***			***2012-13 Targets***		
		Disadvantaged Students*			**Disadvantaged Students***			**Disadvantaged Students***	
	All Oregonians	Minority	Pell Eligible	**All Oregonians**	Minority	Pell Eligible	**All Oregonians**	Minority	Pell Eligible
Completion									
# of bachelor's degrees awarded to Oregonians	408	36	229	447	39	251	462	41	259
# of bachelor's degrees awarded to rural Oregonians	173	17	124	181	18	130	187	18	134
# of advanced degrees awarded to Oregonians	**	**	n/a	**	**	n/a	**	**	n/a
Quality									
% of graduates unemployed in Oregon compared with the % of workforce unemployed in Oregon	Future Submission	n/a	n/a	Future Submission	n/a	n/a	Future Submission	n/a	n/a
Employer satisfaction	Future Submission	n/a	n/a	Future Submission	n/a	n/a	Future Submission	n/a	n/a
Alumni satisfaction	Future Submission	n/a	n/a	Future Submission	n/a	n/a	Future Submission	n/a	n/a

(continued)

Outcome Measures	2010-11			2011-12 Projected			2012-13 Targets		
	All Oregonians	Disadvantaged Students*		All Oregonians	Disadvantaged Students*		All Oregonians	Disadvantaged Students*	
		Minority	Pell Eligible		Minority	Pell Eligible		Minority	Pell Eligible
Connections									
# and % of newly admitted Oregon freshmen entering with HS dual credit or other early college credit	135	24	58	138	13	59	147	14	63
	51%	60%	51%	49%	32%	49%	49%	32%	49%
# of bachelor's degrees awarded to transfer students from Oregon community colleges	164	20	113	193	24	133	199	24	137
Local Priorities *(optional for each institution)*									

Investment

Education and General	2009-10	2010-11	2011-12	2012-13
OIT	$ 18,964,541	$ 19,192,099	$ 14,960,065	

Outcome Measures Actual for 2010-11	**Disadvantaged Students***					
	African-American	Hispanic/ Latino	Native Amer. or Alaskan Native	Pacific Islander	Multi-Racial or Multi-Ethnic	Pell Eligible
Completion						
# of bachelor's degrees awarded to Oregonians	**	18	**	0	11	229
# of bachelor's degrees awarded to rural Oregonians	0	11	**	0	**	124
# of advanced degrees awarded to Oregonians	0	**	0	0	0	n/a
Quality						
% of graduates unemployed in Oregon compared with the % of workforce unemployed in Oregon	n/a	n/a	n/a	n/a	n/a	n/a
Employer satisfaction	n/a	n/a	n/a	n/a	n/a	n/a
Alumni satisfaction	n/a	n/a	n/a	n/a	n/a	n/a
Connections						
# and % of newly admitted Oregon freshmen entering with HS dual credit or other early college credit	**	**	**	**	10	58
	**	**	**	**	59%	51%
# of bachelor's degrees awarded to transfer students from Oregon community colleges	**	8	**	0	6	113
Local Priorities *(optional for each institution)*						

2011-12 Projections	**Disadvantaged Students***					
	African-American	Hispanic/ Latino	Native Amer. or Alaskan Native	Pacific Islander	Multi-Racial or Multi-Ethnic	Pell Eligible
Completion						
# of bachelor's degrees awarded to Oregonians	**	20	**	0	12	251
# of bachelor's degrees awarded to rural Oregonians	0	11	**	0	**	130
# of advanced degrees awarded to Oregonians	0	**	0	0	0	n/a
Quality						
% of graduates unemployed in Oregon compared with the % of workforce unemployed in Oregon	n/a	n/a	n/a	n/a	n/a	n/a
Employer satisfaction	n/a	n/a	n/a	n/a	n/a	n/a
Alumni satisfaction	n/a	n/a	n/a	n/a	n/a	n/a
Connections						
# and % of newly admitted Oregon freshmen entering with HS dual credit or other early college credit	**	**	**	**	**	59
	**	**	**	**	**	49%
# of bachelor's degrees awarded to transfer students from Oregon community colleges	**	9	**	0	7	133
Local Priorities *(optional for each institution)*						

2012-13 Targets	**Disadvantaged Students***					
	African-American	Hispanic/ Latino	Native Amer. or Alaskan Native	Pacific Islander	Multi-Racial or Multi-Ethnic	Pell Eligible
Completion						
# of bachelor's degrees awarded to Oregonians	**	20	**	0	12	259
# of bachelor's degrees awarded to rural Oregonians	0	12	**	0	**	134
# of advanced degrees awarded to Oregonians	0	**	0	0	0	n/a
Quality						
% of graduates unemployed in Oregon compared with the % of workforce unemployed in Oregon	n/a	n/a	n/a	n/a	n/a	n/a
Employer satisfaction	n/a	n/a	n/a	n/a	n/a	n/a
Alumni satisfaction	n/a	n/a	n/a	n/a	n/a	n/a
Connections						
# and % of newly admitted Oregon freshmen entering with HS dual credit or other early college credit	**	**	**	**	**	63
	**	**	**	**	**	49%
# of bachelor's degrees awarded to transfer students from Oregon community colleges	**	10	**	0	7	137
Local Priorities *(optional for each institution)*						

G Shared Governance: Preamble from the Faculty Constitution

The Faculty of Oregon Institute of Technology maintains the institutional philosophy of shared governance characterized by open and responsible communication, fair treatment of individuals, participatory processes, and collaborative decision-making, whereby each member of the Faculty has the responsibility to speak and the right to be heard without prejudice. Such a governance philosophy, with the active support of the Faculty, provides a climate in which ideas can be initiated, policies and practices can be tested, and a unity of purpose can be forged so that all members of the college community are encouraged and supported in their endeavor to contribute to the mission of Oregon Institute of Technology.

Please read the Faculty Constitution, Senate Charter and Senate Bylaws online.

- Faculty Constitution
- Senate Charter
- Senate Bylaws

H President's Advisory Council (PAC)

History

In July 1947, the Oregon Institute of Technology opened as Oregon Vocational School. In September of that year, the State Board of Education, under whose supervision the OVS operated, instructed the State Director of Vocational Education to submit a list of recommended names for appointment to an advisory committee of the School. (It was a common practice for vocational schools to have advisory committees at that time.) It was moved and passed by the Board of Education that the committee would be made up of thirteen members representing agriculture, employers, homemaking, labor, the public and veterans. Thirteen members were officially appointed. The duties of the committee were to consider recommended academic programs and fees, and to support the needs of the institution with the State Board of Education.

As the institution evolved from a vocational school to a two-year technical institute and to a four-year institute of technology, individuals who were living outside the state of Oregon were appointed to the Council. Many of those individuals represented large corporations that hired OIT graduates. The purpose of the Council changed with less involvement in the day-to-day operation of the institution and more in the area of advising institutional leaders about the types of graduates their companies needed and, in 1992, the name was changed to "President's industrial Advisory Council." In 1995, the name was changed to "President's Advisory Council" to indicate a more diverse membership, with representatives from industry, business, health and government. The charge to the Council was again changed with a much broader perspective, including advising about the institutional mission, goals, policies and external relationships. Recently, the Council has assisted the President with legislative matters and marketing events.

Future Role in the context of a Board of Trustees

The Oregon Tech President's Advisory Council is composed of industry and community volunteers with specific interests or expertise related to Oregon Tech. The Council members are acting as individual advisers to the President, who utilizes their expertise to complement and enhance his leadership role at the university and with external stakeholders.

The President's Advisory Council meets with the President for a quarterly meeting and dinner, on an informal basis, to discuss the President's and the university's strategic challenges and opportunities for growth and development. Council members have legal, political, community, and business expertise that is useful to the President as an individual and community leader.

The PAC will continue to advise the President informally, after the transition in authority from the State Board of Higher Education to the Oregon Tech Board of Trustees. The Board of Trustees is an appointed public body, with legal authority for the university's governance, and subject to public meetings law. The PAC is an informal advisory committee, personally selected by the President, with no legal or fiduciary responsibilities, and is not subject to public meetings law.

The members of the PAC as of January 2015 are:

Cecelia Amuchastegui, Educational Consultant

Dianne E. Appell, Engineering Senior Manager, The Boeing Company

William Buckley, Attorney at Law, Buckley Law, PC

Ann Cavanaugh, Owner, Smith Bates

Mary Coucher, Vice President, Alliances and Business Development, IBM Corporation

James DeHoog, General Manager Environmental Technical Services Inc.

Bill Garrard, Former State Representative

Lisa Graham, Chief Scientist, n-Link/PARADIGM

Dan Hallesy, Ultrasound Sales Manager, Esaote, North America Inc.

Roger Harris (Alt. for Patsy Smullin), Controller, California Oregon Broadcasting, Inc.

Denise Honzel, Healthcare Consultant

Sally Jones, Community Member

Jill Mason, Dental Hygienist/Education

Steven Mays, President, Electronic Wood Systems, Int.

Carla McKelvey, MD, MPH, NBMC Pediatrics

Kelley Minty Morris, Outreach and Development, Citizens for Safe Schools

Celia Nunez, State Farm Insurance and Financial Services

Patsy Smullin, President, California Oregon Broadcasting, Inc.

Paul Stewart, President & CEO, Sky Lakes Medical Center

Don Van Luvanee

Steve Vincent, Regional Business Manager, Avista

Heidi Wright, President and Publisher, Klamath Publishing LLC/Herald and News

Robert Wynne, President and General Manager, Klamath Radio

Chris Maples, President, Oregon Institute of Technology

I Strategic Partnerships and Government Relations

The Office of Strategic Partnerships (OSP) and Government Relations promotes and oversees industry and government relationships at the Oregon Institute of Technology. The staff is responsible for campus-wide promotion of the University's economic development mission by facilitating the external relationships that enable the University to contribute to the vitality of its campus regions and the state of Oregon.

Responsibility

1. Building long-term partnerships with businesses and industry associations that are crucial to Oregon Tech's mission;
2. Providing support to secure external funding by leveraging private sector partnerships for grants and sponsored projects;
3. Proactively working with faculty to develop collaborations with industry that lead to sponsored projects, commercialization and entrepreneurial opportunities;
4. Building an alliance of local, state and national support for Oregon Tech's policy and funding priorities; and
5. Representing the University on strategic partnership, industry affairs, and legislative advisory councils with and for the Oregon University System and Oregon Tech.

The OSP collaborates with academic departments, the Office of Sponsored Research (SPA), and the Office of Innovation and Technology Transfer (OITT) to determine Oregon Tech's research priorities and align Oregon Tech's academic mission, faculty research interests with industry, other universities, and economic development and research organizations.

Operationally, the Office of Strategic Partnerships reports to the President to advance the University's strategic priorities. To learn more about the Office of Strategic Partnerships and Government Relations, visit the Oregon Tech website.

Government Relations

Oregon Tech's Board of Trustees will have an active role in government affairs for Oregon Tech, coordinated through the Associate VP for Strategic Partnerships and Government Relations. In the past, Oregon Tech has worked closely with the Oregon University System, the Chancellor's office, and members of a Legislative Advisory Council (one member from each of seven public universities) on a legislative agenda that included support for higher education funding, as well as providing testimony about the impacts of various education policy bills on the OUS and its institutions.

Now that Oregon Tech has its own board of trustees, the AVP for Government Relations participates in a Legislative Advisory Council (LAC) along with the other six public universities that takes direction and guidance from the Presidents Council, composed of the presidents of all seven public universities. In addition, the

government relations function is now supported by:

- A consultant that provides bill tracking and testimony coordination services;
- A lobbyist, Dan Bates, Thorn Run Partners, who supports Oregon Tech, Eastern Oregon University, and Southern Oregon University;
- An industry affairs and government relations coordinator, Brittany Miles.

The Associate VP works closely with the President and LAC to develop a Legislative Agenda for Oregon Tech, and to provide information to legislators about the needs of Oregon Tech's students, and the impacts of proposed legislation on Oregon Tech, its students, faculty and staff.

During the 2015 session, Oregon Tech will utilize the expertise and advocacy of its board during key legislative events:

- Oregon Tech/ Technical and Regional University Day in the Capitol
- End of session advocacy for the higher education budget and Oregon Tech's capital project requests
- Individual calls or meetings with key legislators, especially representatives from board member districts

As with all board business, the Chair of the Board is the primary spokesperson for the Oregon Tech Board of Trustees. All board members will receive support about messaging and advocacy prior to communicating with legislators from the Associate VP for Government Relations and AVP of Public Affairs.

Oregon Tech also contracts for government relations services at the federal level with CFM Strategic Communications in Washington, D.C. Oregon Tech's 2014 federal relations agenda is included in the Appendix.

I Media & Communications Support

A Guide for Oregon Tech's Board Trustees

Introduction to Media

It is more frequent that the Chair, Vice Chair, and Committee chairs of the Board will be called on by the media for comment on a particular issue. But, other Board members are also called on occasion for comment by a news reporter or editor.

News reporters work under constant time pressures, which have increased with the advent of the internet, Twitter, blogs, and other instant news updates. The pressure to meet deadlines often requires reporters to contact sources at times that may reach beyond normal business hours; and to want very fast responses and turnaround times for information.

Such inquiries mean no disrespect or lack of consideration. The reporters are merely fulfilling their work responsibility. They consider news to be a timely commodity. In an age of instantaneous communication, even a few minutes can mean the difference between a story that is timely and one that is dated.

What Makes News?

Reporters, columnists and editors are constantly seeking the following:

1. **Expertise.** News people are generalists. They rely on the expertise of others to help them write and produce their stories. When news people contact you, they want to learn more about something you know or information you can share because of your association with Oregon Tech.
2. **Facts or Analysis.** News reporters deal in facts; editorial writers and columnists deal in opinion. Reporters often call to confirm something they have heard from other sources or get a comment from a Board member on an issue that reflects your statewide responsibilities for higher education.
3. **Timely and Succinct Response.** Radio reporters rarely will use more than 15 seconds of comment from a source (unless it's a talk show). While print reporters may use longer sets of facts and commentary, they too prefer direct and concise answers to their questions. It is never a good idea to go on and on in your response to a reporter. They get lost in your responses and will likely pull out a quote that may not reflect your main point. So keep responses succinct.

Working Together

Here are some tips that may be helpful when responding to media calls:

1. **Call Time.** If you are not prepared to speak to the reporter tell him/her that you cannot speak with them right now but will call them back shortly. Call Di Saunders about the inquiry and she will advise on next steps. **Never feel obligated to speak to a reporter**. It's generally best if on most issues the Board Chair or Vice Chair, or committee Chair, be the spokesperson.
2. **Reporter Info.** Know to whom you are speaking. Obtain the reporter's name, the name of the news organization s/he represents, and the reporter's business telephone number. You may need to call the reporter

back with additional information or refer to Di.

Because Oregon Tech is a public entity, we generally provide broad, open access to the media. Whether a *Herald & News* reporter or a student reporter from the campus newspaper, we like to treat them all as professionals. But, there are some radio entertainment programs that we do not consider as balanced news programs (such as Lars Larson, for example). Thus we do not generally feel the need to be responsive to these types of programs that frequently want to bait and embarrass those they interview.

3. **Aim for Mutual Understanding.** Do not assume that the reporter knows anything about the subject matter. Use humor sparingly to set a relaxed tone for the interview. But avoid humorous or facetious responses. Some reporters will act very chummy and friendly; be friendly but don't let your guard down.

4. **Be Honest.** If you do not know an answer, say so, rather than trying to evade or bluff through answers to a reporter's questions. Avoid "no comment" answers. Indicate instead that you simply do not have enough information or that you have not had enough time to review the issue. If you know when you will be ready to answer the question, give the reporter a time/date when you expect to know the facts or make arrangements to call back at an appropriate time.

5. **Organize Your Thoughts.** If possible, first call Di Saunders before you return a call to the media to see if Oregon Tech has talking points already developed on a particular issue, which is generally the case; or these can be developed quickly for you. At the least, you can have a conversation about the issue with Di or another Oregon Tech staff person to help organize your thoughts so that you can be consistent if called by more than one reporter on the same subject. Limit your focus to one or two key points. Then be sure to refer to those points when you interact with the reporter. Redirect as needed by saying things like, "That's not really the issue here. The issue is…"

6. **Expect that the Story will be written in Lay Terms.** Reporters must write in common language. There are no exclusive higher education beat reporters left in the state, so many reporters will not be familiar with higher education in a comprehensive way, so don't assume that they know as much as you do.

7. **Be Concise.** Short, simple answers are most often used in their entirety. Long, rambling answers will be paraphrased by reporters and often result in what you might regard as an inaccuracy. Never use the phrase "No comment." A "no comment" answer may elicit an unfavorable reaction from a reporter or the reporter's audience. More damaging, it may become your only attribution. Instead, always try to be responsive. It may be that you cannot comment because of legal restraint. Then say so.

8. **Know that You are Always "On the Record."** Always presume that everything you say is likely to be used in a story. Do not say anything you would be embarrassed to read on the front page of the paper. The notion of being able to comment "Off the Record" is something that only occurs with frequency in the Washington DC beltway. It does not happen very often anywhere else. Reporters appreciate those who speak consistently "on the record." If they need background, you should call upon Di Saunders to help organize the response.

   Remember: the interview is never over until the reporter leaves the office or hangs up the phone. Television reporters often desire to shoot "B-Roll" or cut-away footage after asking their questions. Camera personnel may leave the sound recorder "on" after they have finished their formal interviews. If you consider that equipment to be "on" all times, you may save embarrassment later.

9. **Keep Your Cool.** If a reporter seems irritated, chances are that it is because the reporter is under deadline or some pressure from an editor. The very nature of news often creates special problems for reporters. Those pressures may, in

turn, affect your contact with them. Being calm and trying to cooperate can be very important.

10. **Never Ask to Become the Reporter's Editor.** Be the best source you can be; stay with what you believe to be the facts. Let the reporter develop the story. Do not ask to review a reporter's story before it appears. No self-respecting reporter will honor such a request.

11. **End Results.** There will be times when you will be disappointed by a reporter's work. Misquoting and putting using quotes out of context does happen; thus, the importance of making short, clear statements and comments during a media interview. And do not hesitate to call for help from Di Saunders or other Oregon Tech staff.

Broadcasters Have Special Needs

Here are some ways to improve broadcast interview situations:

1. **Be Brief with Answers.** Radio (and television) reporters are usually looking for a "sound bite" of not more than 15 seconds of recording. Be concise and complete with your comments. Let the professionals worry about editing your comments to time requirements. But remember, they will paraphrase long, rambling explanations. If you are being interviewed for broadcast purposes, try to talk to the reporter for a minute or two before the interview to get some sense of what the reporter actually wants to place on tape.

2. **Know the Time of Day.** Radio reporters aim their top stories to "air" at morning drive time (6 to 9 a.m.), midday newscasts (12 noon), and evening drive time (4 to 6 p.m.). Television reporters aim for 12 p.m., 4 p.m., 5 p.m., 6 p.m., 10 p.m., and 11 p.m. newscasts. Thus, both radio and television reporters plan to do most of their interviewing from mid-morning (8:30 a.m.) to early afternoon (2 p.m.).

   Some radio interviews are done live and others are taped and edited. Always speak as though you are live, again, using talking points, "sound bites," and short, clear statements (that sound unrehearsed). Make sure you are in a quiet room and try to use a land-line for radio interviews. Generally, radio interviews can be done over the telephone and not so often in the studio except for programs such as OPB's *Think Out Loud* and some local talk radio programs.

3. **Plan Ahead for Television.** Television interviews as a Board member are very rare. If you are to appear on TV or will be otherwise videotaped, dark colored suits and blazers are best. Wear solid color shirts and blouses. And always be firm about your comfort. The rule is: If you are uncomfortable (sitting, standing, etc.) you will look uncomfortable on the air.

Speeches, Commentary Writing and Presentations for Board Trustees

Board trustees will sometimes be asked to speak at meetings such as business Chambers, Rotary, Kiwanis, City Club, community meeting, a higher education or other conference, or other venues; please let Di know about these bookings in advance. She is available to help with these and other types of speeches and presentations to ensure consistency in messages and data. Get in touch with Di as needed for help with requests.

Editorial Boards: Occasionally Oregon Tech's President, Chris Maples, or Di Saunders will ask if you can attend an editorial board meeting at a newspaper or other media outlet. These are meetings with one or more editors, and sometimes a reporter, from a news outlet. Generally it would Oregon Tech asking for an editorial board meeting so that we could bring forward an important issue from our perspective. Some of these issues include explaining the importance of getting the legislature's support of higher education funding; supporting affordability initiatives; and the like.

Op-Eds: We may also call upon you to byline or co-byline a commentary or "op-ed" piece for a

newspaper. This again would be on an issue that we are advocating for or feel should be elevated. Di Saunders can draft these types of pieces after interviewing board members.

Another editorial piece which might be bylined by a board member is a Letter to the Editor to respond to an issue related to Oregon Tech or higher education in Oregon. Before writing a Letter to the Editor or other public comment, please go through Di Saunders.

Social Media

Oregon Tech uses social media to communicate to our stakeholders and to gain recognition for our mission, students, programs, faculty, athletics, alumni and the institution overall. Please *Like* Oregon Tech's Facebook page and follow us on Twitter.

Any commentary that you put out on social media can be scrutinized through your role as an Oregon Tech trustee. Please be cautious about comments made through social media as these can be widely circulated and judged in the context of your public role.

Email Communications

As an Oregon Tech trustee, your written communications are "discoverable," and part of the public record of your work as a Trustee. Any Oregonian can request public records, which can include emails, texts, written documents and the like, from any computer, public or private, generated by a public employee, or in this case, an Oregon Tech trustee. Use this as a guide: don't write anything in email that you don't want to see on the front page of the newspaper.

Contact Information

For assistance any time:

Contact Di Saunders by cell at 971-219-6869, and in the office at 503-821-1303; di.saunders@oit.edu