

To: Faculty, Staff, and Representatives of the Student Body

From: The Ad Hoc Strategic Priorities Committee¹

Date: August 1, 2013

Re: Strategic Planning

I. Introduction

Reed will begin “strategic planning” in the fall of the 2013, with the goal of establishing priorities in the summer of 2014 and strategies for implementing those priorities by the end of June 2015. The college periodically engages in planning exercises, with the last major planning exercise coming in 2004-05, in concert with the planning for the last campaign. While this planning exercise will provide priorities for future fundraising goals, it is intended to be less focused on resource issues and to ask broader questions of our present practice.

Engaging in strategic planning provides the rare and welcome opportunity to ask ourselves some fundamental, existential questions about Reed as an intellectual community and educational institution. It presents the occasion for wide-ranging discussions on what we want the college to be in twenty years and prompts us to collectively consider plans to advance that vision. While many would agree that we do an excellent job of educating our students, we face new challenges to liberal arts education, among them our own challenge to ourselves to do what we do better and to ensure that what we do remains relevant and accessible to the broadest community of learners. This will involve interrogating our current practices with the goal of aligning them with our broader vision; determining what else we might want or need to do in order to fulfill that vision; realistically assessing what we can do, given our actual and potential resources; and recognizing and addressing the challenges, both internal and external, that confront the college, as well as identifying possible opportunities.

The goal is to consider and determine our broader priorities, and not to produce a comprehensive review of everyday college operations. Our planning needs to go beyond the normal processes of review and policy setting, in order that we can examine and become more intentional about what we do, whether in order to recommit to it or to modify it. We should treat no institutional structure or practice, beyond our fundamental commitment to the liberal arts, as beyond need of justification to ourselves and to all of those who have a stake in the education we offer.

¹ Committee members: John Kroger, Chair. Faculty: Mark Burford, Noelwah Netusil, Nigel Nicholson, Kathy Oleson, Sonia Sabnis, Janis Shampay, Paul Silverstein. Staff: Hugh Porter. Student: Ari Galper. Trustee: Peggy Noto. Administrative Support: Dawn Thompson.

In order to add urgency and focus to the process, we have to concentrate on a limited number of questions. These topics no doubt do not cover all of the issues that some of us might find important, but represent the Ad Hoc Committee's best sense, after broad consultation with faculty, staff, students and trustees, of the most pressing, exciting and significant questions facing the college. The goal of the process is to be in a position where we can determine at the Retreat in June 2014 a limited number of institutional priorities on which we can focus.

The big questions facing the college are familiar: to determine what constitutes an excellent education in the liberal arts for a twenty-first century student, to provide that education at Reed, and to articulate why students should choose that education. The educational environment in which we operate has certainly seen some changes (for example, changed expectations on the part of students, parents and employers, a more pressing need to justify a liberal arts education, increasingly demanding federal legislation, tuition rising much faster than inflation, changing demographics and concerns as to the sustainability of the small liberal arts college model), while other challenges are constant (finding the right students for Reed, finding and developing the right faculty and staff, achieving the right balance between breadth and depth of study, and developing the right relationships between Reed and the larger community). The college of 2013 can, however, address these issues from a position of some strength, less vulnerable to recession, with more financial stability, and with much stronger academic support services, more generous support for faculty research and teaching, and much improved campus facilities. Indeed, we can treat the challenges that confront us as an opportunity both to reaffirm and refine the education that we offer.

An important requirement of strategic planning is broad community involvement, whether through service on committees or working groups or through broad and frequent consultation. Faculty, staff, trustees and representatives of students and alumni will be involved. The process will require a time commitment on the part of the community, but it offers a chance for us to become better acquainted with what the college already does and how it works, as part of the larger process of asking where we want to be in twenty years.

Finally, while the first year of strategic planning (2013-14) will be dedicated to establishing priorities, the second year (2014-15) must be dedicated to deciding how we might implement those priorities. This involves a realistic assessment of institutional resources (present and potential), as well as of institutional structures. It is also important to establish ways to assess the particular programs through which these priorities are implemented, with respect to the priorities they are intended to advance. In many cases, such assessment will not involve tracking measurable results, but where measurable goals that genuinely capture the progress of a project can be established, they should be.

The basic premises of this strategic planning process are, therefore, that the process:

- Set major priorities, not produce a comprehensive plan about every aspect of college operations;
- Be able to interrogate any aspect of college practice, except for our core commitment to the liberal arts;
- Inform future budgeting and fundraising priorities;

- Engage as many members of the community as possible, facilitating collaborative conversations and greater institutional awareness among faculty, staff, the board of trustees, and representatives of students and alumni;
- Establish plans and processes for implementing those priorities that are determined; and
- Establish ways to assess the success of these plans and processes, including measurable goals where appropriate.

II. Timeline

A. Preparation: March - August 2013

March – May 2013

Ad-Hoc Committee meets to develop a plan for Strategic Planning. Discussion of process at April board of trustees meeting (April 12-13) and with CAPP, CAT, senior staff, and Vice Presidents. President makes introductory tours to alumni and parents in chapter cities for introduction, campaign celebration, and preliminary discussion of the college's future.

June – July 2013

Ad-Hoc Committee gathers input from faculty, staff, and student leaders about draft plan, including suggested Working Groups. Ad-Hoc Committee considers input, finalizes planning timeline, and drafts protocols and charge for working groups. Discussion of college's future continues with alumni over reunions (June 12-16), representing the first of a number of such forums to be held over the 2013-14 academic year. In addition, smaller working group to be recruited from alumni, parent and friend leaders (now known as Strategic Planning Partners or SP2).

August 2013

Working Groups chairs are appointed; faculty, staff and trustee members also selected. Ad Hoc Committee distributes charges and circulates set of background materials useful to working groups.

B. Work Phase: September 2013 - June 2014

September – January 2013

Students selected for Working Groups, and Working Groups are finalized. Working groups meet, consult with community and with other working groups, share progress with the community, and prepare preliminary reports for the president. Any special guests for retreat are recruited. Working Groups meet in conjunction with October board meeting, to facilitate trustee participation.

January 2014

Ad-Hoc Committee reconvenes to review reports and to consider steps for the second semester. In particular, how do the individual working group's reports support or conflict with one another? Should committees be asked to work together more closely? Are costs of proposed changes accurately described? Does further information need to be gathered?

January – March 2014

Working Groups continue their work based on input from president and others. Reports shared with community, further input gathered, relative merits of different options discussed, and ways that different proposals impact other areas of the college explored. February 2014 board meeting: president reports and Working Group's trustee members report on progress.

April 2014

Final reports completed by Working Groups.

April – May 2014

President considers reports in consultation with Ad Hoc Strategic Priorities Committee, CAPP, CAT, and senior staff. April board meeting: discussion of Working Groups reports. Retreat agendas and materials are formed and details finalized.

June 12-15, 2014

Joint retreat for faculty, senior staff, student representatives and trustees in Sunriver, Oregon. Major priorities determined.

C. Coordination and Execution Phase: Summer-Fall 2014

President works with faculty and staff leadership to create plans for implementing strategic priorities determined at Summer retreat, including fundraising planning. Budgetary impacts and fundraising targets for all possibilities are reviewed.

III. Working Groups

After broad consultation with the faculty, staff, students and trustees, the Ad Hoc Committee has formulated the following working groups.

Two particular features of the proposal are worth flagging. First, the Committee proposes making certain issues the business of every working group; these appear at the end, and are referred to as "cross-cutting issues." Each working group would thus consider how the proposals it is considering affects, among other things, the diversity of the college, or the college's identity. Of course, it is not necessarily clear how we should define a diverse

college or the college's mission, and it is envisaged that the working groups will make such questions part of their discussions and consultations.

Second, the Committee has wrestled with the question of how many working groups are too many. Other structures were considered: fewer working groups with broader areas of responsibility, fewer working groups and fewer areas of consideration, a hierarchical structure in which topics deemed more important would be treated in the first year, with secondary topics treated in the second year. In the end, the Committee decided that, although the larger number of groups may prove unwieldy and will generate a certain amount of overlap, it would be a benefit to the planning process, and to community governance generally, to offer opportunities for a greater number of faculty, staff, students and trustees to be involved in the working groups, and that the working groups be encouraged to explore a broad set of issues. Working groups will be directed to network closely with other working groups, and vehicles for encouraging communication between working groups and the broader community will be put in place (and the committees will be encouraged to use their creativity here also).

A. Foundational Curriculum

What learning and skills (such as writing, rhetoric, collaboration, quantitative reasoning, critical thinking, creativity or problem-solving) should students gain in foundational or first-year courses (including Hum 110, introductory science classes and first-year foreign language classes) in order to flourish in their subsequent years at Reed and their lives after Reed? What academic requirements, institutional structures and pedagogical approaches will further these goals? How do we understand the first-year curriculum within our broader model of liberal arts education?

B. Intermediate and Advanced Curriculum

What learning and skills do we want students to gain in later courses, whether in preparation for their theses or, more broadly, as part of an advanced liberal arts education or in preparation for life after Reed? What kind of graduates do we want to produce? What does it mean for them to thrive beyond Reed? What academic requirements, institutional structures and pedagogical approaches will further those goals? Are the students well served by the current divisional structure, for example? Or, what is the best arrangement for majors? Should we consider more majors organized by area or theme, create minors or enable frequent double majors? What new fields or programs of study should we consider to augment our curriculum? How might we best use our consortial arrangements to share curricular resources?

C. The Arts at Reed

What are our goals with respect to the fine and performing arts? Given that we are at a watershed moment in the Arts at Reed, in terms of facilities, faculty and academic support staff, what changes, if any, should we make to encourage greater participation in the performing arts? What should be our goals with regard to curricular requirements, relations

to other departments, institutional structures, relations with the Portland Arts community, or student recruitment? Beyond student productions, should Reed aspire to a more active role as a presenter of performing arts programming? What is the place of the performing arts within the context of Reed's "life of the mind" academic culture, and vice versa?

D. Education Outside the Classroom

Should Reed do more to encourage students to be involved in activities off-campus? What are the goals of such programs, and what are their results? How do they relate to the academic program? Specific questions include, should Reed require or support more involvement in community service? Should Reed do more to facilitate study abroad? What more should Reed do to help students prepare for careers after graduation? What changes, if any, should Reed make to its relations to Portland and the world?

E. Summer and January Term

What role do the summer and winter breaks play in a Reed education? To what extent should we concern ourselves with providing opportunities for students in these periods, and what sort of opportunities should they be? What opportunities do we offer already and how do they relate to the academic program? Should we continue to have a long winter break, and if so, do we need to offer more possibilities to the students during January? Should we offer more opportunities during fall and spring break, whether externships, workshops, or field trips?

F. Community Governance and Academic Administrative Structure

Do our current faculty governance and community governance processes work well? What are the proper roles of faculty, staff, students and trustees in community governance? Do we have the administrative capacity to administer our programs responsibly and effectively? Is the present committee structure viable, in terms of the demands it makes on faculty, staff and student time, the equitable distribution of work, the kinds of expertise with state and federal legislation that some committees require, and the speed with which committees can respond? Does our current departmental and divisional structure serve our pedagogical goals? If not, what changes should we consider? What is the relationship between the Honor Principle and community legislation?

G. Research, Teaching and the Liberal Arts College

How do we understand the idea of the teacher-scholar? What kinds of support for faculty are necessary to help them to fulfill this role in their teaching and research? How do we cultivate continued and rigorous engagement on the part of faculty with their disciplines, and how do we ensure that this engagement feeds into the education of our students? What, indeed, is the role of research in the liberal arts? How and why is research meaningful to the educational mission of the College, both for faculty and students? Why is the teacher-scholar model, and the student-scholar model, a good one, and what forms does this model in fact take at Reed? Where and how do they intersect in different disciplines?

H. Faculty and Staff Quality of Life

What are our goals for faculty and staff quality of life? What are our goals for the professional development of faculty and staff? What are our goals for compensation and benefits? How does the college best encourage excellent work by faculty and staff to sustain the college's programs?

I. Whom Do We Want to Educate?

What kinds of students do we think most benefit from a Reed education, and are they choosing to apply and come to Reed? What is our desired student body composition? What kind of financial aid is required to meet our goals? Do we want more applications, and if so, from what kind of students? (Intellectuals, performers, scientists, leaders, world-changers, international students, students who have room for growth or need a second chance?) Are we receiving enough applications from these students? How will demographic and market changes impact our admissions and financial aid strategies?

J. Student Success

Are we satisfied with current student life and quality of life? Are we doing what we need to do to help students thrive personally and intellectually? Do we need to do more to build a greater sense of community on campus, and if so what should we do? What place should sports and outdoor programs play in a Reed education? What would we do to increase retention? Do we want to set a retention goal? Do want to increase the number of students living on campus, and if so, how would this be accomplished?

K. Long-term Financial Health of the Institution

Is our financial model (revenue assumptions, committed expenditures) sustainable? How can ensure that we have sufficient flexibility to deal with changing circumstances? What are the worst-case financial scenarios for Reed in the next twenty years? What infrastructure (in terms of financial structure, physical plant, land or information technology) do we need to achieve our goals? What is the optimal size for Reed College in the next thirty years? Should we set institutional goals for reducing our environmental footprint? This committee's work will be influenced significantly by the conclusions and recommendations of the other working groups, and will lay the foundation for execution planning in the last phase of the planning process.

Cross-Cutting Issues (to be considered by all working groups):

(1) Reed's mission. Why should students choose to come to Reed and why should parents want to help them attend? Do any changes being considered challenge, enhance or alter any aspects perceived as central to Reed's particular mission or culture? What is and what should be central to Reed's mission and/or institutional culture? What makes it unique, and in what ways can Reed be distinctive in the next twenty years?

(2) Student outcomes. How do any changes being considered improve on how Reed prepares students for successful and fulfilling lives after graduation, whatever their future career goals? How do students benefit from the changes? What kinds of graduates do we want Reed to produce?

(3) Diversity and inclusion: Do any changes being considered have an impact, positive or negative, on the accessibility or attractiveness of a Reed education to a more diverse student body, or a more diverse community more generally? How can the changes be used to forward the community's goals regarding diversity and inclusion?

(4) The changing educational environment. How do any changes considered respond to changes or potential changes in the applicant pool, changing expectations on the part of students and parents and potential employers, the rise of on-line education, or other external developments that are putting pressure on our educational model?

(5) Technology. How can changes in technology capacity or in the use of technology further any of the changes being considered? What are the technological requirements, if any, for any of the changes considered? What impact, if any, will technological changes have on the issues being considered?

(6) Environment and Sustainability. How do the changes being considered impact our environmental footprint?

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