



TO: President Astrid S. Tuminez

FROM: Linda Makin and Jeff Peterson, Co-Chairs
University Planning Advisory Committee

DATE: April 14, 2022

SUBJECT: 2021-22 UPAC Annual Report

UPAC has completed its annual work on university-wide planning activities consistent with its Standing Charge and the Presidential Charge for 2021-22. This year, UPAC was given a narrowed range of responsibility in order to go more in depth, and the committee successfully met all areas of its Standing and Presidential Charges for 2021-22.

Standing Charge

The ongoing responsibilities of UPAC are to

- Maintain awareness of UVU's strategic and operating environment, advising the President and UEC regarding emerging forces in that environment and potential university responses.
- Assess whether UVU is fulfilling its mission, action commitments, and objectives and whether it will be able to do so sustainably in its foreseeable internal and external operating environments in accordance with the standards and policies of UVU's regional accreditor, the Northwest Commission on Colleges and Universities (NWCCU).
- Review major university plans to ensure coordination across planning efforts and alignment of plans with initiatives of the State of Utah and Utah System of Higher Education.
- Communicate findings to the university leadership through UEC and to the wider university community through their organizational communications channels.

Presidential Charge

In 2021-22, UPAC will

- Conduct a strategic review of UVU's internal environment, external environment, and value chain to identify the university's sustainable competitive advantages in the changing higher education environment.
- Prepare the Mission Fulfillment Progress Report, reviewing and revising as necessary the mission fulfillment indicators considering the recommendations of the NWCCU Mid-Cycle Review.

2021-22 ACCOMPLISHMENTS

PESTLE Analysis

Standing Charge: Maintain awareness of UVU's strategic and operating environment, advising the President and UEC regarding emerging forces in that environment and potential university responses.

Presidential Charge: Conduct a strategic review of UVU's internal environment, external environment, and value chain to identify the university's sustainable competitive advantages in the changing higher education environment.

UPAC conducted an external environmental scan (PESTLE). A PESTLE analysis reviews six key external factors (Political, Economic, Sociological, Technological, Legal, and Environmental) that can influence an organization. This information can help administrators make more informed decisions.

UPAC divided into smaller working groups to analyze each PESTLE area, and each working group reported on the information they'd gathered and wrote up a summary for the UPAC co-chairs. This summary was then used to compile a report for the President and her Cabinet.

Porter's Five Forces

Standing Charge: Maintain awareness of UVU's strategic and operating environment, advising the President and UEC regarding emerging forces in that environment and potential university responses.

Presidential Charge: Conduct a strategic review of UVU's internal environment, external environment, and value chain to identify the university's sustainable competitive advantages in the changing higher education environment.

UPAC conducted an industry analysis using Porter's Five Forces. This model analyzes the main sources of competition in an industry. It highlights an organization's position in that industry and the factors that affect the organization's competitiveness.

UPAC divided into smaller working groups to conduct the analysis of 1) availability of substitutes, 2) potential new entrants, 3) bargaining power of suppliers, 4) bargaining power of buyers, and 5) intensity of competition. Each working group reported on the information they'd gathered and wrote up a summary for the UPAC co-chairs. This summary was then used to compile a report for the President and her Cabinet.

Internal Analysis

Standing Charge: Maintain awareness of UVU's strategic and operating environment, advising the President and UEC regarding emerging forces in that environment and potential university responses.

Presidential Charge: Conduct a strategic review of UVU's internal environment, external environment, and value chain to identify the university's sustainable competitive advantages in the changing higher education environment.

An internal analysis that looked at both institutional and instructional advantages was completed. Overall, UVU is affordable, flexible, and cost effective. Open admission, dual mission, and concurrent enrollment allow a come-as-you-are approach to education, and UVU has amazing employees with a strong focus on student success.

The internal analysis identified areas for improvement. UVU is not currently meeting student demand for online courses. The diversity of UVU's faculty and staff is not reflective of the diversity in UVU's service region or among UVU's student population. Faculty and staff relations need improvement, especially through clearer expectations, better internal communication, and talent management.

SWOT Analysis

Presidential Charge: Conduct a strategic review of UVU's internal environment, external environment, and value chain to identify the university's sustainable competitive advantages in the changing higher education environment.

Standing Charge: Assessing whether UVU is fulfilling its mission, action commitments, and objectives and whether it will be able to do so sustainably in its foreseeable internal and external operating environments.

The SWOT analysis was a major focus of UPAC activity throughout the year. UPAC conducted an external environmental scan (PESTLE), an industry analysis (Porter's Five Forces), and an internal capabilities assessment. This research was then consolidated into a SWOT analysis to explore what UVU does best and devise a successful strategy for the future. The SWOT analysis looked at four aspects of UVU (Strengths, Weaknesses, Opportunities, and Threats) and assessed what is going well right now and what strategies can be used in the future. Strengths and weaknesses are internal issues that the university can control, while opportunities and threats are external issues that are outside of the university's control. The primary purpose of the SWOT analysis is to identify internal structural factors and external issues that will affect UVU's ability to fulfill its mission on an ongoing basis.

UPAC divided into four working groups that reviewed information gathered through the PESTLE, Porter's Five Forces, and internal capabilities assessments and identified key focus areas. Jeff Peterson then consolidated the information for UPAC's review and discussion.

UPAC shared its draft SWOT analysis with President's Cabinet. To gather more insight, UPAC co-chairs shared the draft SWOT analysis with the following groups: International Advisory Board (IAB); UVUSA; Student Affairs Department Leaders (SADL); University Executive Committee (UEC); Professional Association of Campus Employees (PACE); and Faculty Senate. Feedback received informed UPAC's final SWOT assessment which will be presented to President's Council and Board of Trustees for their acceptance.

Peer Institutions Report

Standing Charge: Assess whether UVU is fulfilling its mission, action commitments, and objectives and whether it will be able to do so sustainably in its foreseeable internal and external operating environments in accordance with the standards and policies of UVU's regional accreditor, the Northwest Commission on Colleges and Universities (NWCCU).

Presidential Charge: Conduct a strategic review of UVU's internal environment, external environment, and value chain to identify the university's sustainable competitive advantages in the changing higher education environment.

Fall 2020 data that shows UVU offers quality, affordability, and effectiveness to scale. UVU's tuition and fees are slightly below average for all peer institutions, far below average for our regional university peers, and has remained relatively stable over the last five years. We are the largest of our regional university peers by nearly 10,000 FTE students. On average, we spend less money per student than our peer institutions, but we are spending a higher percentage of that money on actual instruction.

Key Performance Indicators

Standing Charge: Maintain awareness of UVU's strategic and operating environment, advising the President and UEC regarding emerging forces in that environment and potential university responses.

Presidential Charge: Conduct a strategic review of UVU's internal environment, external environment, and value chain to identify the university's sustainable competitive advantages in the changing higher education environment.

Currently, the mission fulfillment indicators evaluate UVU's objectives using a total of 42 indicators, some of which have multiple data points. During the 2020 NWCCU Mid-Cycle Review, UVU was advised to reduce the number of indicators and focus on those that truly matter for institutional success.

UPAC recommends that UVU shift its primary assessment efforts to directly assessing its three action commitments: include, engage, and achieve. Action commitments will be

assessed using no more than 5 indicators, each with an associated benchmark indicating a minimum (i.e., non-aspirational) level of success. This will reduce the number of mission fulfillment indicators to no more than 15 total. The indicators will be evaluated using a revised rubric based on that currently in use.

2022-23 PRESIDENTIAL CHARGE RECOMMENDATIONS

UPAC recognizes that, like many of the university's governance organizations, its role is evolving with the university. Its range of vision and ability to promote cross-campus collaboration commends its value as an advisory body, communication forum, and working group for President's Council and the University Executive Council. Considering these roles and the evolution of the university's leadership structure, UPAC expects that its standing charge will remain relevant while evolving in detail.

We believe our value to the university will be maximized if our standing responsibilities continue to include the following:

Planning

- Advising the University Executive Committee and President's Council regarding the university's mission and goals.
- Reviewing the alignment of UVU planning efforts with initiatives and trends beyond the university, especially those of the State of Utah and the Utah Board of Higher Education.
- Reviewing new and revised major operational and unit master plans.
- Identifying specific areas of university operations and practices for focused improvement.
- Investigate issues of importance to UVU's ability to sustainably fulfill its mission, action commitments, and objectives that the university or the committee may find appropriate.

Assessment

- Identifying meaningful, assessable, and verifiable indicators, measures, and benchmarks for evaluating achievement of UVU's mission, action commitments, and objectives in cooperation with other university organizations and in accordance with the standards of the NWCCU.
- Assessing whether UVU is fulfilling its mission, action commitments, and objectives in accordance with the standards of the NWCCU.
- Assessing UVU's ability to sustain fulfillment of its mission and action commitments in its foreseeable internal and external operating environments.

Communication

- Establishing communication practices to increase the dissemination of information from upper administration to the broader campus community and to offer opportunity for input by constituencies.
- Providing feedback for the Planning, Budget, and Assessment (PBA) process.
- Providing recommendations and feedback regarding major presidential initiatives and addresses.

Presidential Charge

In addition to its standing charge, we recommend that UPAC's charge for 2022-23 specifically include the following:

- Conduct UVU's Mission Fulfillment Progress Report, considering revisions to the mission fulfillment indicators as appropriate based on the findings of the 2020 Mission Fulfillment Baseline Evaluation, the NWCCU Mid-Cycle Review, and other institutional priorities.
- Support implementation of Vision 2030, in particular identifying areas of focus based on the 2022 SWOT analysis, reviewing measures of achievement for the plan, and coordinating Vision 2030 metrics with indicators for mission fulfillment.
- Review and provide input for new and updated campus plans including Completion Plan 3.0, Inclusion Plan, and Strategic Enrollment Management Plan.
- Understand, support, and, to the extent practical, contribute to the higher education agenda of the Utah Board of Higher Education, and support UVU's alignment of its intentions with those of UBHE as they continue to evolve.

We also look forward to addressing other issues at the administration's request.

ACKNOWLEDGEMENTS

During 2021-22 UPAC was co-chaired by Dr. Jeff Peterson, Associate Professor of Business Management, and Dr. Jeffrey Alan Johnson, Director of Institutional Effectiveness, Planning, and Accreditation Support, with executive sponsorship of Linda Makin, Vice President for Planning, Budget, and Finance. The committee is composed of 37 representatives from all areas of campus who are members of the committee *ex officio* or are appointed to serve two-year terms.

Dr. Jeffrey Alan Johnson's term as chair concluded this year and he left UVU in February. The committee expresses its deep appreciation for his capable leadership of the committee and service to the university over the past year. Twelve members of the committee have completed their service on UPAC this year:

Aicha Rochdi	Barb Smith	Bonnie Mortensen
Bryant Bradt	Cory Fralick	Darah Snow
Karen Magana-Aguado	Marisa Crist	Mike Smidt
Tammy Nguyen	Tom Keck	Vessela Ilieva

Please join us in thanking these UVU faculty, staff, and administrators for their service.

UPAC is pleased to have successfully supported the planning activities of the university this year. We believe that UPAC is an important instrument of shared governance at UVU, a central structure in UVU's transparent and collaborative decision-making processes that fosters a culture of planning, assessment, improvement, and accountability. UPAC thus appreciates the openness of your administration to UPAC's input and the actions it has taken to address the issues UPAC has raised. We look forward to continuing this important collaboration among students, staff, faculty, and the administration.