## LIVERSITY PLANNING ADVISORY COMMITTEE

#### UTAH VALLEY UNIVERSITY

TO:	President Astrid S. Tuminez
FROM:	Laurie Sharp and Jeff Peterson, Co-Chairs University Planning Advisory Committee (UPAC)
DATE:	April 4, 2023
SUBJECT:	2022-2023 UPAC Annual Report

UPAC has completed its annual work on university-wide planning activities at Utah Valley University consistent with its 2022-2023 Charter and Charge. During this academic year, university-wide planning transitioned from the Planning, Budget, and Finance Division with Vice President Linda Makin serving as the executive sponsor to the Academic Affairs Division with Provost and Senior Vice President Wayne Vaught serving as the executive sponsor. As part of this transition, Dr. Laurie Sharp, Associate Provost for Academic Programs and Assessment became UPAC Co-Chair effective January 2023, and Vice President Linda Makin continued her service to UPAC in the capacity of an executive appointee from the Planning, Budget, and Finance Division.

This annual report summarizes accomplishments for each of UPAC's ongoing responsibilities and 2022-2023 charge from the viewpoints of the current co-chairs (i.e., Dr. Laurie Sharp & Dr. Jeff Peterson) and UPAC members. This annual report also includes recommendations for UPAC's ongoing responsibilities and 2023-2024 charge based on feedback shared by UPAC members. Lastly, this annual report acknowledges UPAC members who have completed their service to the University through their work on this committee.

#### **UPAC Accomplishments**

#### UPAC's 2022-2023 Charter: Summary of Accomplishments

UPAC's 2022-2023 Charter specifies four ongoing responsibilities of UPAC that must be fulfilled periodically. Below is a summary of each ongoing responsibility and UPAC's related accomplishments.

*Maintain awareness of UVU's strategic and operating environment, advising the President and UEC regarding emerging forces in that environment and potential university responses.* During the 2022-2023 academic year, UPAC's primary focus during the Fall 2022 semester was to assist with completion of the Vision 2030 refresh and development of the Balanced Scorecard. Fall 2022 efforts were led by Vice President Linda Makin and Dr. Jeff Peterson. UPAC's primary focus during the Spring 2023 semester involved identification of alignment between campus master plans (i.e., Academic Master Plan, Digital Transformation Plan, Facilities Master Plan, Inclusion Plan, Completion Plan 3.0, Sustainability Plan) and the Utah System of Higher Education's 2021 Strategic Plan to the Vision 2030 refresh document. Spring 2023 efforts were led by Dr. Laurie Sharp and Dr. Jeff Peterson.

## *Review major university plans to ensure consistency with the university strategy, across planning efforts, and with initiatives of the State of Utah and Utah System of Higher Education.*

Vice President Linda Makin shared the Vision 2030 refresh document with Taylor Adams, Associate Commissioner for Strategic Plans at the Utah System of Higher Education. In December 2022, Vice President Linda Makin invited Taylor Adams to be a guest speaker at a regularly scheduled UPAC meeting to discuss alignment between the Vision 2030 refresh document and initiatives of the State of Utah and Utah System of Higher Education. In February 2023, Dr. Laurie Sharp and Dr. Jeff Peterson divided UPAC members into seven small working groups and tasked each group with reviewing either a specific campus master plan (i.e., Academic Master Plan, Digital Transformation Plan, Facilities Master Plan, Inclusion Plan, Completion Plan 3.0, Sustainability Plan) or the Utah System of Higher Education's 2021 Strategic Plan and identifying its alignment and alignment gaps with the Vision 2030 refresh document. Each small group presented their findings to UPAC members in March 2023, and Dr. Laurie Sharp used this information to create a series of strategy maps (i.e., UVU Strategy Maps) to serve as planning resources for the entire campus community. The UVU Strategy Maps are visual representations of the University's and State's overall objectives and how they relate to one another. In late March 2023, Dr. Laurie Sharp disseminated the UVU Strategy Maps by email to the Vice Presidents for each Division and Deans and Associate Deans for each school/college to use as tools for developing their respective annual administrative unit plans for the 2023-2024 academic year. Additionally, the UVU Strategy Maps will be posted soon on the website for the Office of Institutional Effectiveness, Accreditation, and Academic Assessment so that any campus stakeholder may access and use them. UPAC is hopeful that the UVU Strategy Maps will be informative to those with oversight responsibility for the institutional strategic plan and campus master plans as they evaluate the latest iteration and design future iterations. Copies of the UVU Strategy Maps are provided with this annual report.

## Assess whether UVU is fulfilling its mission and action commitments and whether it will be able to do so sustainably in accordance with the standards and policies of the Northwest Commission on Colleges and Universities (NWCCU).

On January 1, 2020, NWCCU stakeholders, commissioners, and staff members, along with chief executive officers of eligible member institutions voted to adopt the NWCCU Standards of Accreditation and NWCCU 2020 Eligibility Requirements. Accordingly, NWCCU updated the Handbook of Accreditation, a primary resource that presents the Commission's Standards for Accreditation, guides institutions through the institutional evaluation process, and assists

accreditation review teams at each stage of review. Within the Handbook for Accreditation, NWCCU describes the seven-year accreditation cycle, which encompasses ongoing evaluation of an institution's responses to the Commission's accreditation Standards. Self-evaluation processes during the seven-year accreditation cycle include annual reports, a Mid-Cycle Report in Year 3; a Policies, Regulations, and Financial Review in Year 6, and an Evaluation of Institutional Effectiveness in Year 7, which applies to member institutions that are seeking reaffirmation of accreditation.

The Mid-Cycle Report is a formative evaluative process focused on Standard One of NWCCU's 2020 Standards for Accreditation in the areas of mission fulfillment, student achievement, and assessment of student learning. UVU's Mid-Cycle Review was submitted to NWCCU on September 10, 2020 and addressed UVU's mission and action commitments, as well as UVU's mission fulfillment evaluation process. NWCCU responded to UVU on February 12, 2021 and indicated acceptance of the report. In UVU's current accreditation cycle, efforts have been underway for preparing the Year 6 Policies, Regulations, and Financial Review to be submitted by September 1, 2023. The Year 6 Policies, Regulations, and Financial Review is a self-study of Standard Two of NWCCU's 2020 Standards for Accreditation. Thus, assessment of whether UVU is fulfilling its mission and action commitments was not a UPAC activity during the 2022-2023 academic year.

### Communicate findings to university leadership through UEC and to the wider university community through their organizational communication channels.

Each UPAC Co-Chair (i.e., Vice President Linda Makin from September 2022 through December 2022 and Dr. Laurie Sharp from January 2023 and forward) communicated findings from UPAC activities regularly to university leadership via University Executive Council and the wider university community through organized communication channels, such as email messages, updates shared during scheduled meetings, and information posted on relevant webpages.

#### UPAC's 2022-2023 Charge: Summary of Accomplishments

UPAC's 2022-2023 Charge specifies six specific responsibilities of UPAC that were to be fulfilled during the 2022-2023 academic year. Below is a summary of each specific responsibility for the 2022-2023 academic year and UPAC's related accomplishments.

### Carefully review and provide feedback on iterative drafts of the Vision 2030 refresh with particular focus on the connection with the 2022 SWOT analysis.

During the months of September and October, Vice President Linda Makin and Dr. Jeff Peterson divided UPAC members into three small groups and tasked each with reviewing specific objective sections of the Vision 2030 refresh document (i.e., Include, Engage, Achieve). Each small group reviewed their assigned section and provided feedback in the form of a presentation to UPAC members. Vice President Linda Makin shared this feedback with the executive leaders who were overseeing the Vision 2030 refresh endeavor. Subsequently, Vice President Kyle Reyes returned to UPAC as a guest speaker to report how the feedback provided by UPAC and other stakeholder groups at Utah Valley University was integrated into the Vision 2030 refresh document.

# Support implementation of Vision 2030 by identifying areas of focus based on the 2022 SWOT analysis, engaging with UEC on implementation and deliverables, reviewing measures of achievement for the plan, and coordinating Vision 2030 metrics with indicators for mission fulfillment.

Under the direction of the Provost and Senior Vice President, Wayne Vaught, University Executive Council engaged in efforts to develop a Balanced Scorecard during the 2022-2023 academic year. The Balanced Scorecard in intended to be an important tool from which the University may measure, monitor, and modify the priority initiatives delineated in the Vision 2030 refresh document. In October 2022, Vice President Linda Makin presented a high-level vision for the Balanced Scorecard to UPAC members and explained its intention to assess the University's efforts towards mission fulfillment. In December 2022, Provost and Senior Vice President Wayne Vaught presented a draft version of the Balanced Scorecard to UPAC members and explained that University Executive Council will be the primary body responsible for monitoring progress towards indicators that are aligned with the strategies and goals of the Vision 2030 refresh document. Provost and Senior Vice President Wayne also explained that each Vision 2030 objective (i.e., Include, Engage, Achieve) will have an assigned steward to oversee the development and refinement of indicators, milestones, and near-term initiatives. UPAC members were provided with subsequent updates regarding the status of development and refinement of the Balanced Scorecard in January 2023 by Laura Busby, Interim Director of Institutional Research, who was assisting with creation of a dashboard to visually represent progress towards achievement of indicators. In March 2023, Dr. Laurie Sharp informed UPAC members that the Balanced Scorecard and its dashboard were in the final stages of completion and shared the finalized version of indicators, milestones, and near-term initiatives with UPAC members to elicit feedback.

# Prepare UVU's Mission Fulfillment Progress Report, considering revisions to the mission fulfillment indicators (KPIs) as appropriate in consultation with Institutional Research and based on the findings of the 2020 Mission Fulfillment Baseline Evaluation, the NWCCU Mid-Cycle Review, and other institutional priorities.

As noted previously in this annual report, efforts were underway in preparation for the Year 6 Policies, Regulations, and Financial Review to be submitted by September 1, 2023. In Utah Valley University's current accreditation cycle for NWCCU, assessment of whether the University is fulfilling its mission and action commitments was not a UPAC activity during the 2022-2023 academic year.

### *Review USHE's Strategic Plan and identify opportunities for UVU to advance USHE's goals and objectives and review impact of proposed changes within USHE.*

As mentioned previously in this annual report, Taylor Adams, Associate Commissioner for Strategic Plans at the Utah System of Higher Education, was an invited speaker at a December 2022 UPAC meeting. During this presentation, Taylor was very complimentary about the Vision 2030 refresh document and discussed its alignment with initiatives of the State of Utah and Utah System of Higher Education. In February 2023 and March 2023, UPAC engaged in efforts to create a series of strategy maps (i.e., UVU Strategy Maps) that serve as visual representations of the University's and State's overall objectives and how they relate to one another. One of UPAC's goals for creating the UVU Strategy Maps was to provide a visual representation of how the University is advancing USHE's goals and objective through the Vision 2030 refresh document and the University's campus master plans.

## Identify ways that UVU can effectively advance and promote its mission as a community college and university by reviewing and preparing responses and recommendations to the legislative-directed review of community colleges in Utah.

In January 2023, Vice President Linda Makin and Aaron Fairbourn made a presentation to UPAC members entitled "Achieving UVU's Integrated Dual Mission." This presentation was intended to be a response and recommendation to the legislative-directed review of community colleges in Utah. The "Achieving UVU's Integrated Dual Mission" included overviews of the missions of community colleges and regional public universities, as well as ways in which the University achieves its integrated dual mission. After the presentation, UPAC members engaged in related discussion and provided feedback to Vice President Linda Makin and Aaron Fairbourn from which Utah Valley University's response and recommendations could be strengthened.

### *Review and provide input for new and updated campus plans including Completion Plan 3.0, Inclusion Plan, and Strategic Enrollment Management Plan.*

As mentioned previously in this annual report, UPAC members engaged in efforts to create a series of strategy maps (i.e., UVU Strategy Maps) in February 2023 and March 2023. This effort involved UPAC members in deep reviews of all campus master plans, including the Academic Master Plan, Digital Transformation Plan, Facilities Master Plan, Inclusion Plan, Completion Plan 3.0, and Sustainability Plan. The UVU Strategy Maps visually depict how each campus master plan aligns with the Vision 2030 refresh document, as well as the Utah System of Higher Education's 2021 Strategic Plan. The Strategic Enrollment Management Plan was not included in this endeavor, as its purpose is very different from the campus master plans. Additionally, the Strategic Enrollment Management Plan is not a document intended for widespread dissemination.

#### UPAC's 2022-2023 Charge: UPAC Member Viewpoints

To prepare for this annual report, UPAC members were asked to indicate the extent in which UPAC addressed each specific responsibility. UPAC members were invited to complete a questionnaire developed in Microsoft Forms that used a five-point Likert-type scale ranging from Strongly Disagree (i.e., score of 1) to Strong Agree (i.e., score of 5) for respondents to rate progress for each specific responsibility. The questionnaire was emailed to 34 UPAC members, of whom 15 UPAC members submitted a response (i.e., approximate 44% response rate). A summary of UPAC member ratings for specific responsibilities is provided in the table below, followed by qualitative excerpts from UPAC members concerning UPAC's accomplishments during the 2022-2023 academic year.

#### **UPAC Member Ratings of Specific Responsibilities**

Specific Responsibilities	
Carefully review and provide feedback on iterative drafts of the Vision 2030	
refresh with particular focus on the connection with the 2022 SWOT analysis.	
Support implementation of Vision 2030 by identifying areas of focus based on the	
2022 SWOT analysis, engaging with UEC on implementation and deliverables,	

Specific Responsibilities	Mean
reviewing measures of achievement for the plan, and coordinating Vision 2030	
metrics with indicators for mission fulfillment.	
Prepare UVU's Mission Fulfillment Progress Report, considering revisions to the	
mission fulfillment indicators (KPIs) as appropriate in consultation with	
Institutional Research and based on the findings of the 2020 Mission Fulfillment	
Baseline Evaluation, the NWCCU Mid-Cycle Review, and other institutional	
priorities.	
Review USHE's Strategic Plan and identify opportunities for UVU to advance	
USHE's goals and objectives and review impact of proposed changes within	
USHE.	
Identify ways that UVU can effectively advance and promote its mission as a	
community college and university by reviewing and preparing responses and	3.4
recommendations to the legislative-directed review of community colleges in Utah.	
Review and provide input for new and updated campus plans including Completion	
Plan 3.0, Inclusion Plan, and Strategic Enrollment Management Plan.	

#### **UPAC Member Qualitative Excerpts**

#### Greatest accomplishments, highlights, and strengths of UPAC.

With respect to the greatest accomplishments, highlights, and strengths, UPAC members acknowledged that "the detailed and iterative review of Vision 2030" "produced a very high quality 'refresh." Additionally, UPAC members expressed that "looking at Vision 2030 and how it aligns with "USHE's strategic plan" and the University's campus master plans helped identify "overlap and synergy." UPAC members also recognized the "effectiveness of work groups" that were "cross-functional teams" and "very productive" in facilitating "great perspectives from all areas of campus." As such, UPAC members indicated that UPAC was able to provide "great advisory counsel to the President and Cabinet."

#### Areas needing improvement, weaknesses, and opportunities to improve UPAC.

With respect to areas needing improvement, UPAC members indicated a need to "streamline the SWOT analysis" to be more efficient with use of time. UPAC members also suggested a need to better acquaint new and existing UPAC members with the "goal of UPAC," "why [each committee member] is a part" of UPAC, and how UPAC's "charge year-by-year fits into the broader picture" of Utah Valley University. UPAC members also shared the following as opportunities for improving this committee:

- "More depth in terms of discussion or outcomes,"
- "Effective exercises to provide feedback,"
- "A communication strategy to facilitate two-way communication between UPAC and the broader campus community," and
- "Access to institutional data needed to make informed recommendations."

#### What specific recommendations do you have to inform the 2023-2024 UPAC charge?

UPAC members made the following recommendations to inform the 2023-2024 UPAC charge:

• "Continue the work outlined in bullet five of UPAC's 2022-23 charge: *Develop new strategies to advance and promote UVU's mission as a community college and university.* 

Include within these strategies a focus on flexible learning, especially at the associate degree level."

- "Ensure there is a deliberative process to review the Balanced Scorecard to ensure [UPAC] has the right metrics and that they can be measured. Set up accountability systems to track progress in the campus master plans."
- "Share more information about unit planning."
- "Something related to NWCCU accreditation visits."
- "Focus on operationalizing Vision 2030."

With this feedback in mind, Dr. Laurie Sharp intends to collaborate with Provost and Senior Vice President Wayne Vaught to formalize a draft of the 2023-2024 UPAC Charter and Charge for approval from President Astrid Tuminez.

#### **UPAC Acknowledgements**

#### **Executive Sponsor and Co-Chairs**

As mentioned previously in this annual report, UPAC experienced a leadership transition during the 2022-2023 academic year when university-wide planning transitioned from the Planning, Budget, and Finance Division with Vice President Linda Makin serving as the executive sponsor to the Academic Affairs Division with Provost and Senior Vice President Wayne Vaught serving as the executive sponsor. As a result of this transition, Dr. Laurie Sharp assumed co-chair responsibilities from Vice President Linda Makin. In January 2023, Vice President Linda Makin announced her plans to retire in Spring 2023. UPAC expresses its deep appreciation for her service to the University.

Additionally, Dr. Jeff Peterson's term as co-chair concluded this year, and UPAC expresses its deep appreciation for his service to the University.

#### **Executive Appointees**

The following executive appointees completed their service to UPAC during the 2022-2023 academic year:

- Dr. Vessela Ilieva, Dean of School of Education
- Dr. Aicha Rochdi, Director Teaching Effectiveness and Fellowship in the Office of Teaching and Learning

UPAC expresses its deep appreciation to each of these executive appointees for their service to the University.

#### **Organizational Appointees**

The following organizational appointees completed their service to UPAC during the 2022-2023 academic year:

- Mark Arstein, Vice President of Institutional Advancement
- Linda Makin, Vice President of Planning, Budget, and Finance/CFO
- Dr. Hilary Hungerford, Faculty Senate President and Associate Professor Earth Science
- Bonnie Mortensen Rodriguez, PACE Past President and Associate Director Online Programs in UVU Online
- Lexi Soto, UVUSA Student Body President

• McKay Isham, Director – Internship Services in Engaged Learning Internships UPAC expresses its deep appreciation to each of these organizational appointees for their service to the University.

The following organizational appointees experienced a job role shift during the 2022-2023 academic year and will continue their service to UPAC as an organizational appointee in their new role:

- Dr. Kyle Reyes, Vice President of Institutional Advancement
- Dr. Michelle Kearns, Vice President of Student Affairs
- Dr. Quinn Koller, Director of Institutional Effectiveness, Accreditation, and Academic Assessment
- Amanda Cooke, Program Manager of Institutional Effectiveness, Accreditation, and Academic Assessment
- Rachelle Blake, Program Manager of Institutional Effectiveness, Accreditation, and Academic Assessment

#### **Support Staff Members**

The following support staff members completed their service to UPAC during the 2022-2023 academic year:

- Aaron Fairbourn, Presidential Intern in the Planning, Budget, and Finance Division
- Stacy Fowler, Executive Assistant for the Vice President of Planning, Budget, and Finance
- Cindy Wilkinson, Admin Support IV for Academic Programs and Assessments

UPAC expresses its deep appreciation to each of these support staff members for their service to the University.

#### **Committee Members**

The following committee members completed their service to UPAC during the 2022-2023 academic year:

- Dr. Maria Blevins, Associate Professor Applied Communication
- Dr. Michael Bohne, Professor Exercise Science
- Dr. Sean Crossland, Assistant Professor Master's Education/Higher Education Leadership
- Dr. Theresa Haug-Belvin, Assistant Professor Student Leadership & Success Studies
- Dr. Ryan Leick, Associate Professor Aviation Science
- Heath Gertsch, Associate Director in Printing Services
- Drew Burke, Senior Director Equity/Title IX, Employee Relations/Organizational Development
- Bryant Bradt, Associate Registrar Registration/Records/NCAA/Degree Audit
- Darah Snow, Senior Director in Multicultural Student Services
- Kylee Parke, Program Manager Foundation and Campaign Initiatives
- Corey Fralick, Director Campus Services
- Barb Smith, Director Communications
- Laura Busby, Director Business Intelligence and Research Services

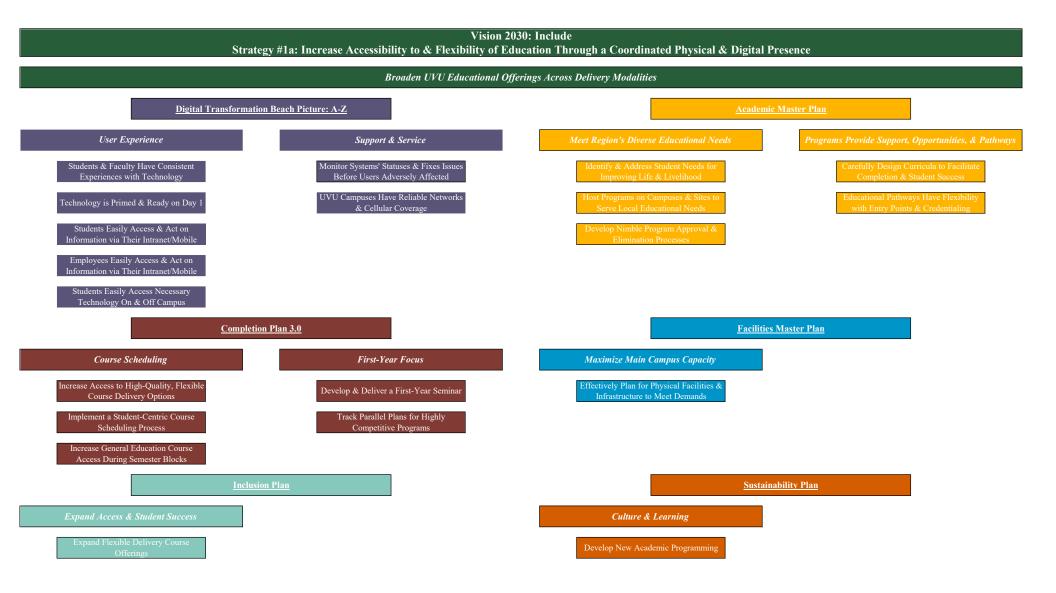
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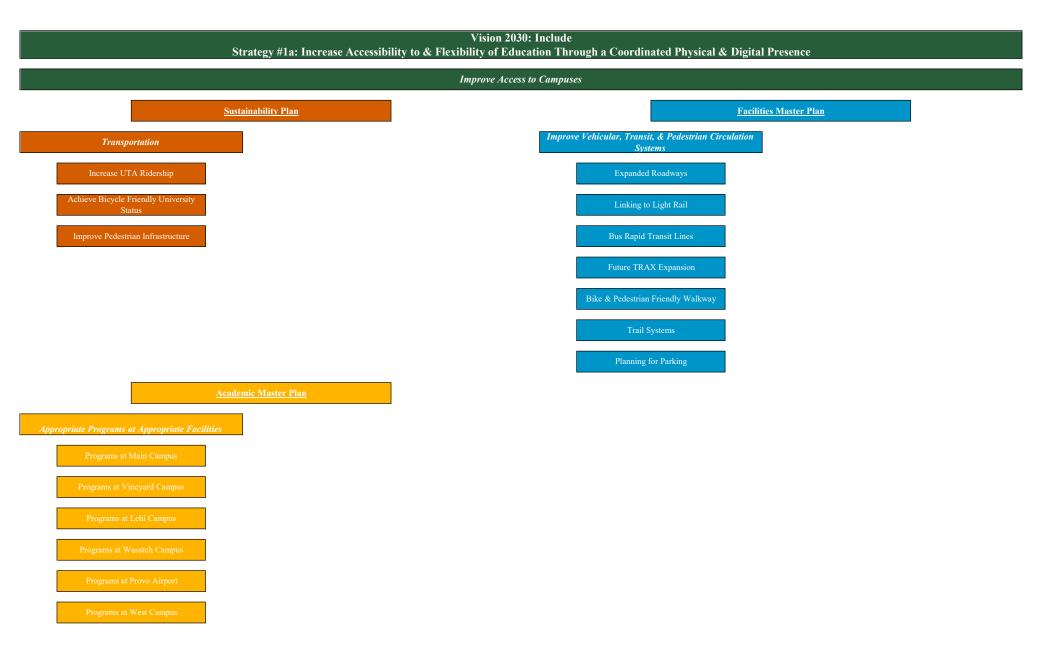
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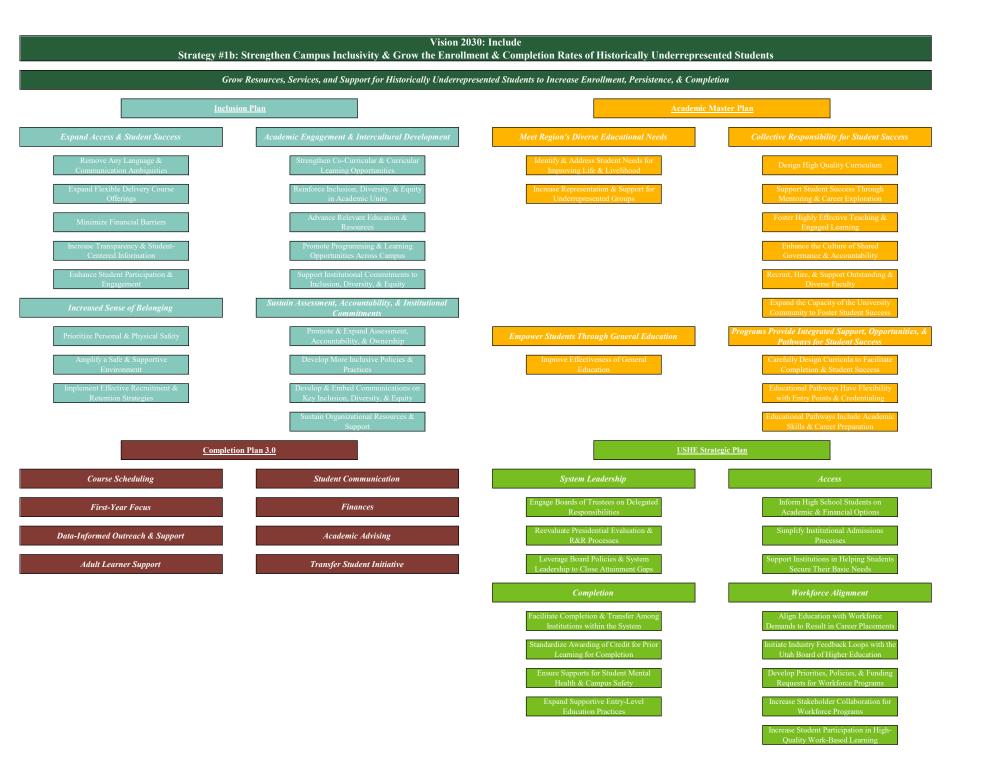
# UVU Strategy Maps

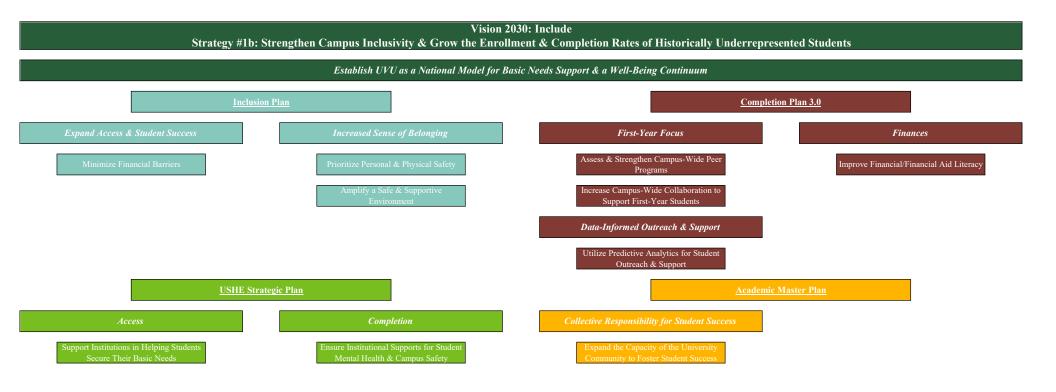
# Vision 2030: Include

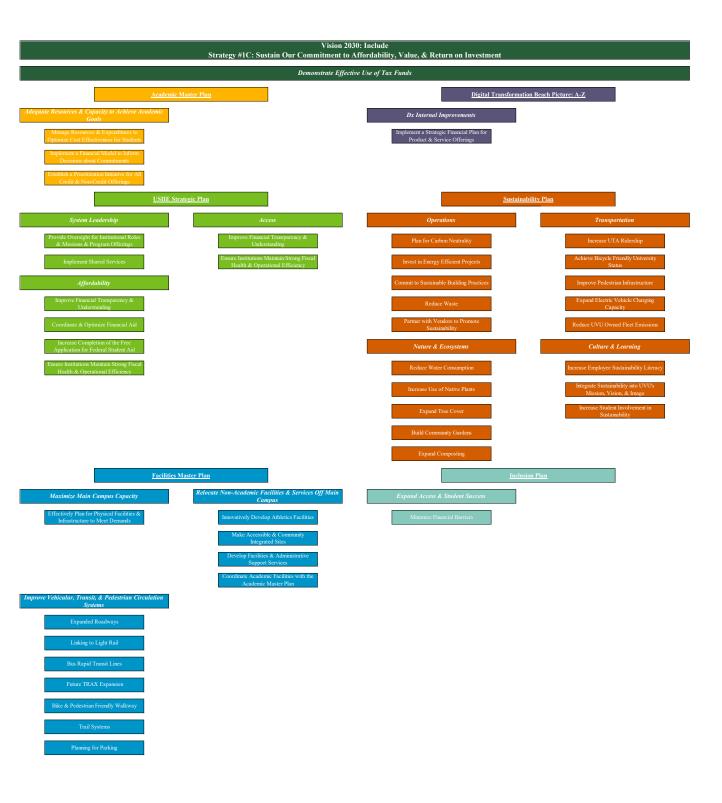


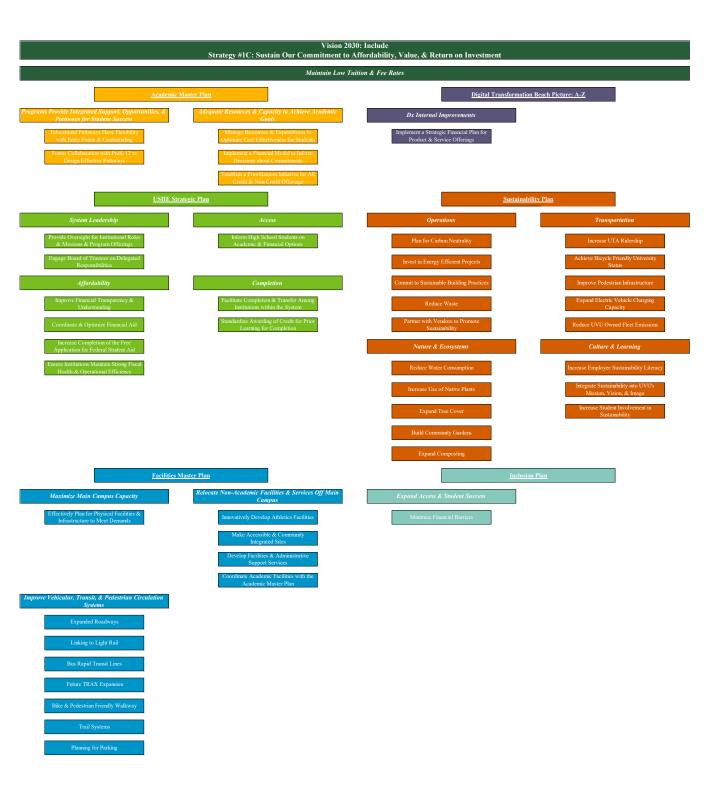


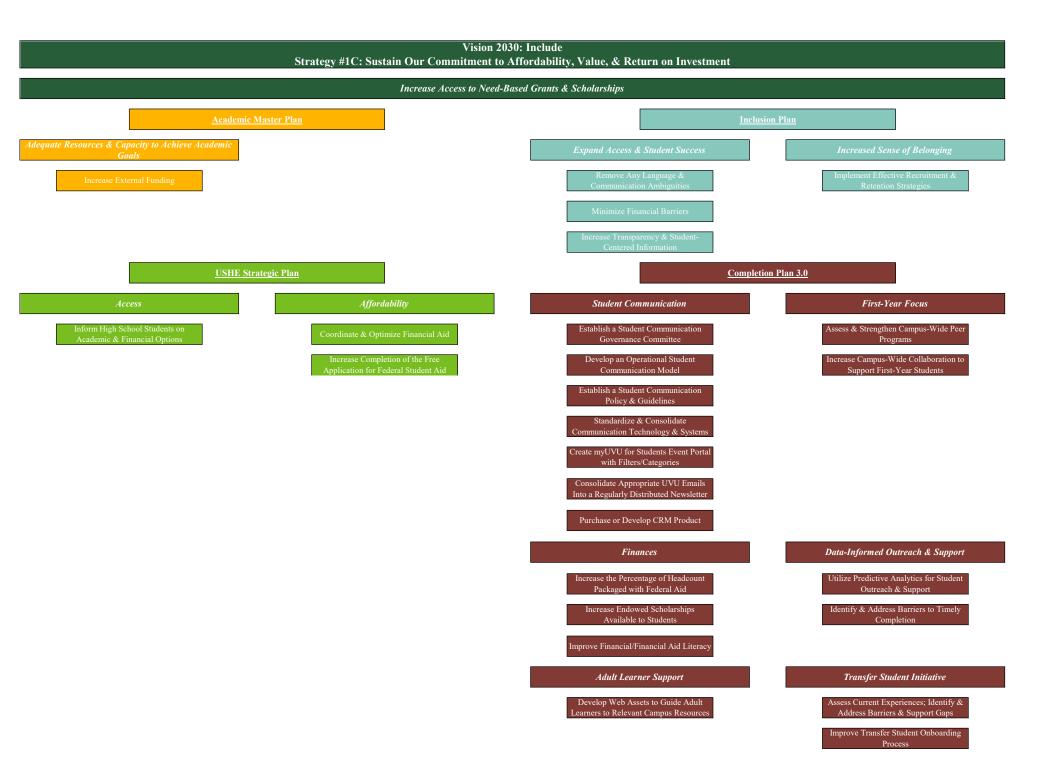










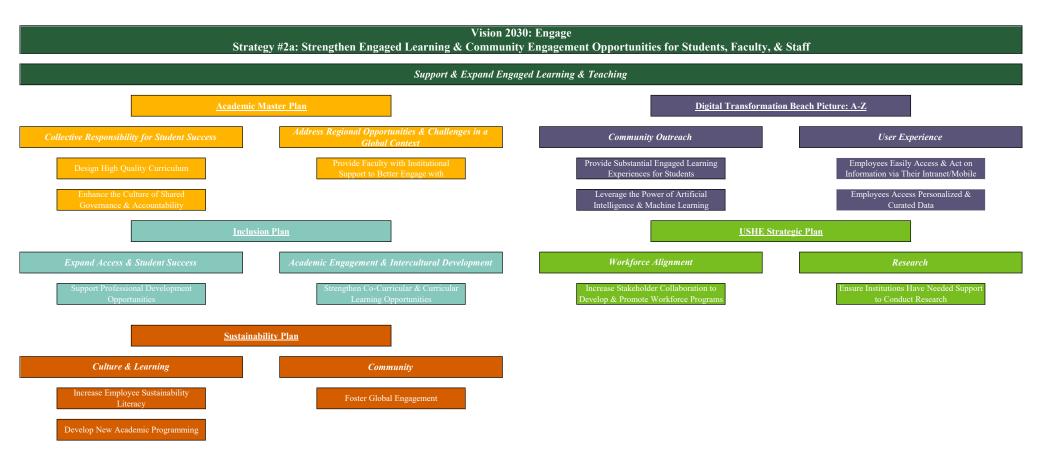


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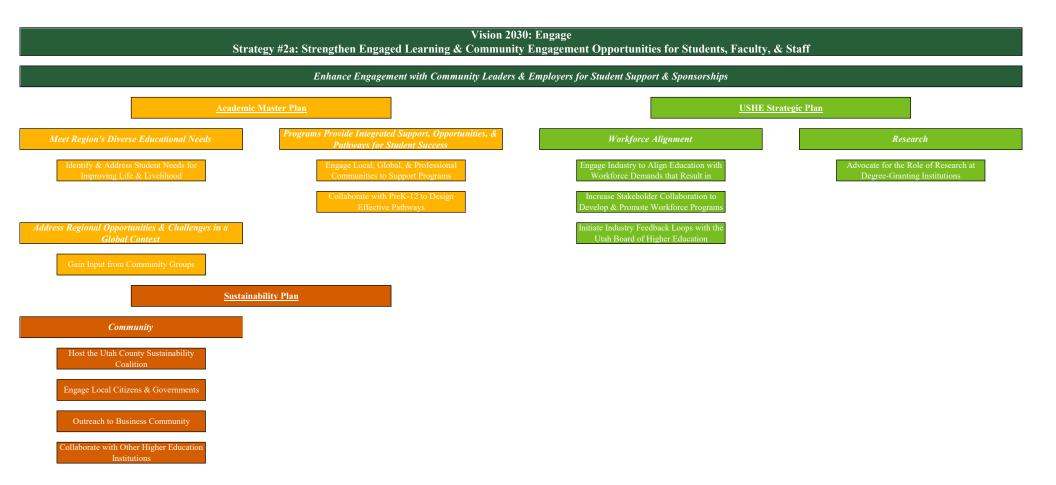
# UVU Strategy Maps

# Vision 2030: Engage

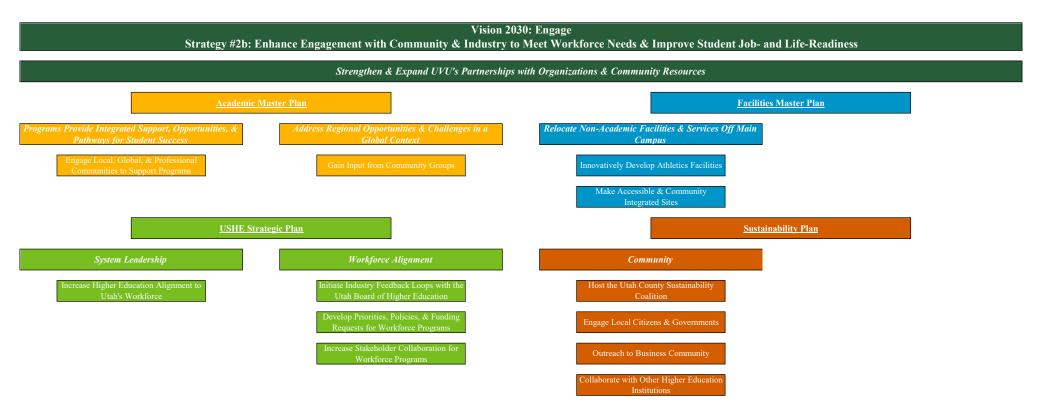


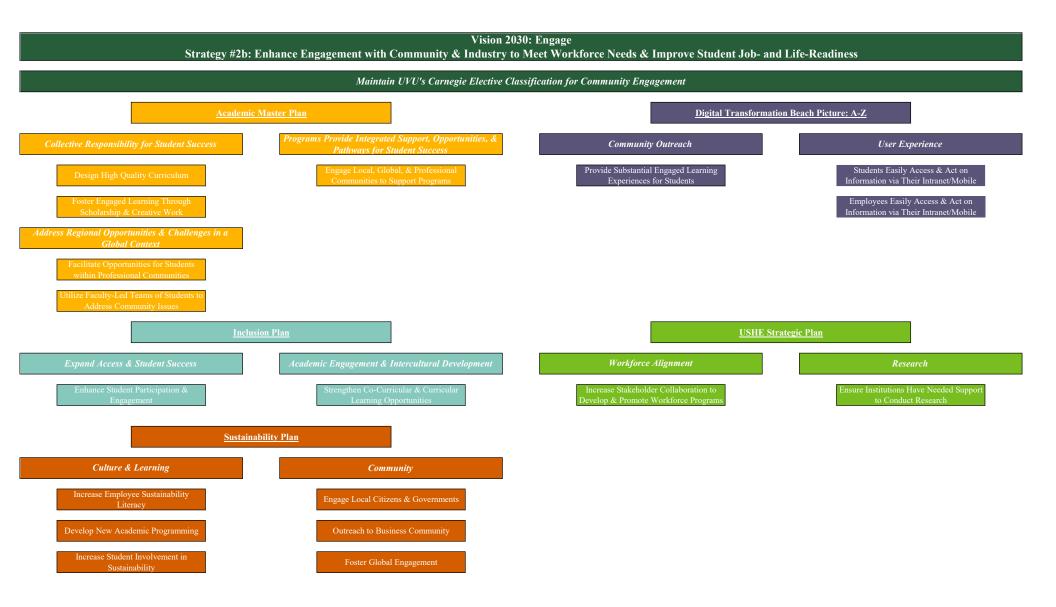


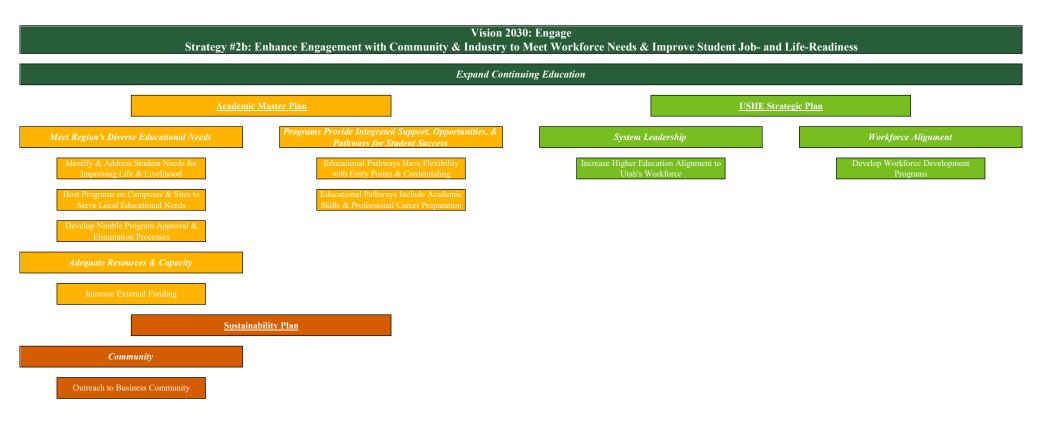


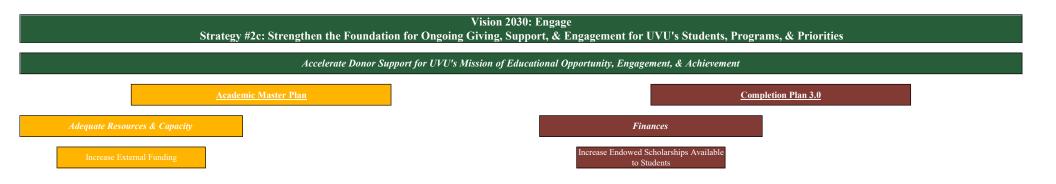










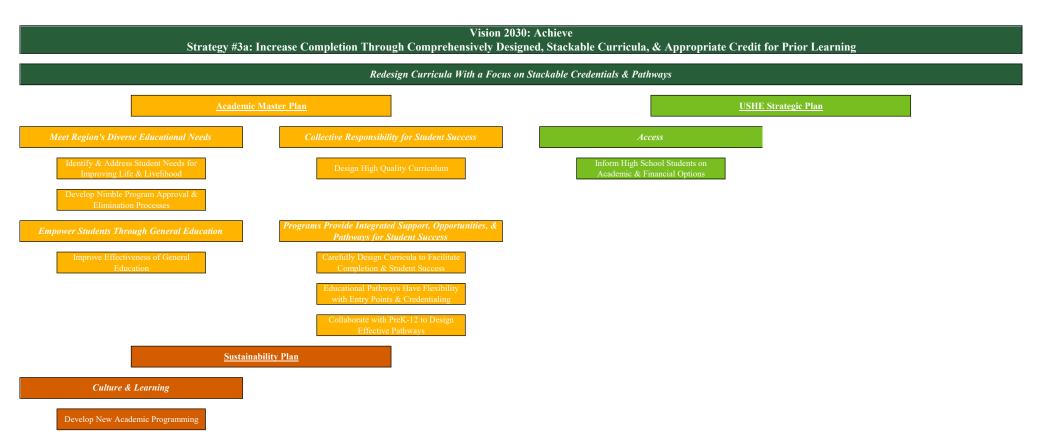


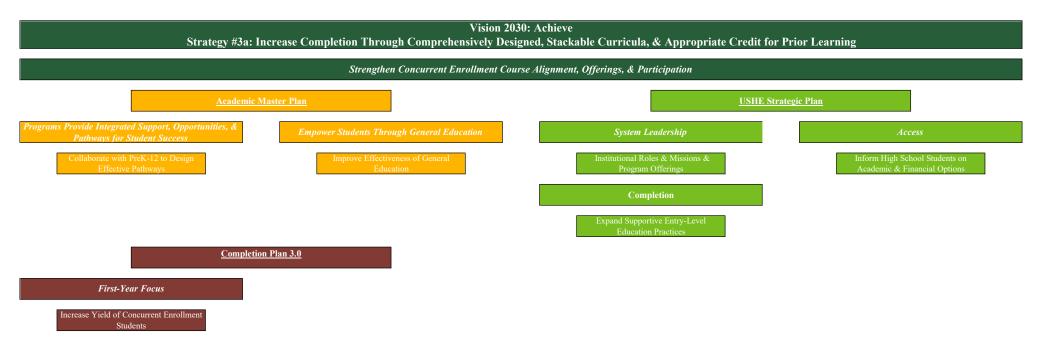
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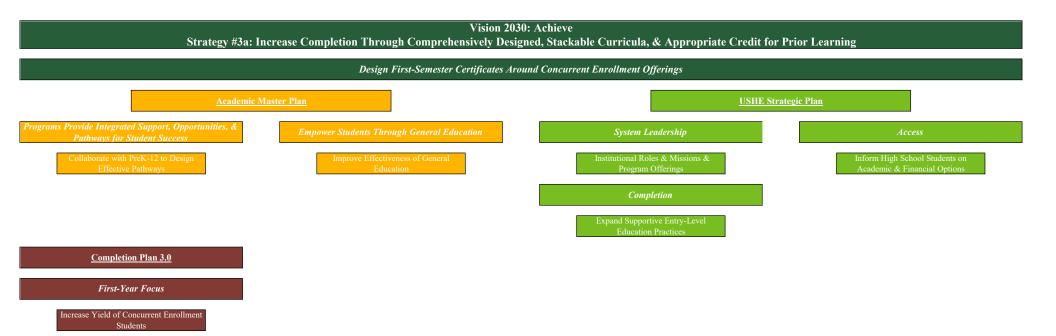
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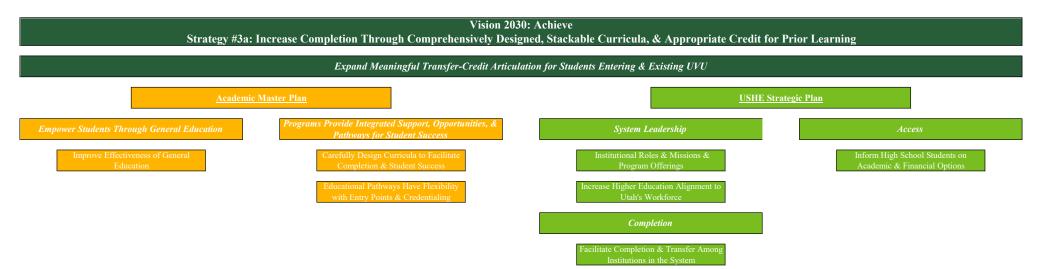
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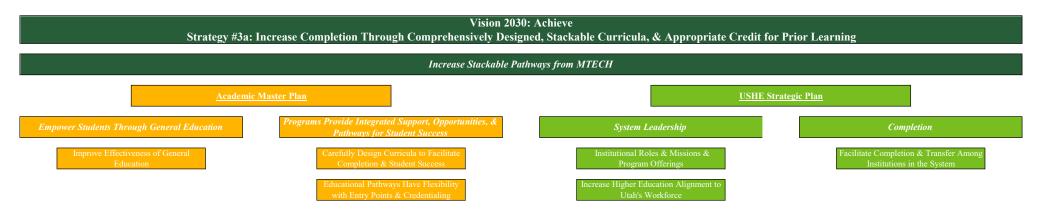
# Vision 2030: Achieve

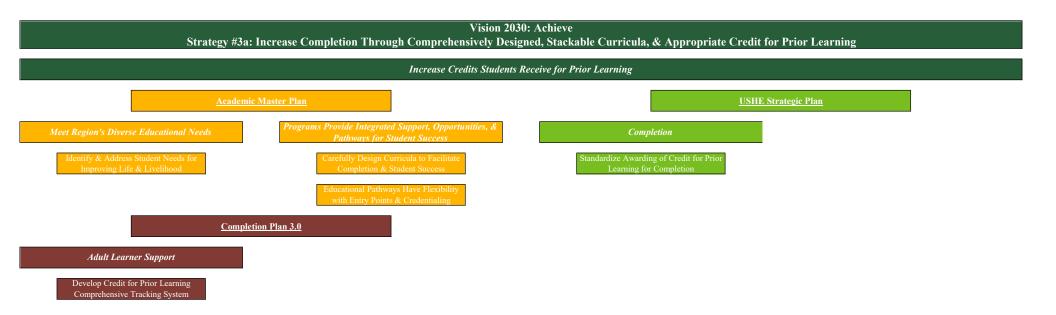


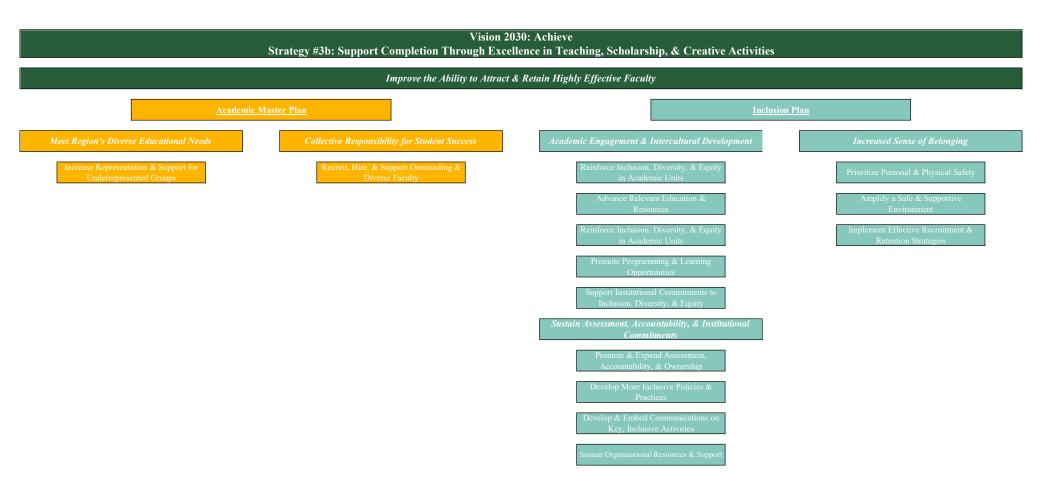


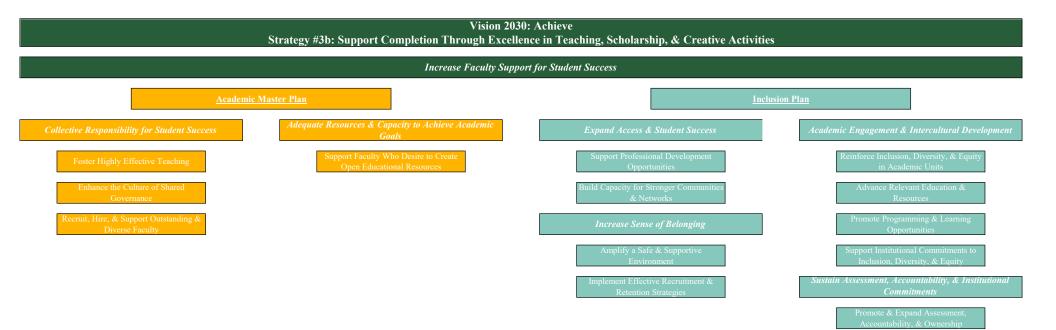






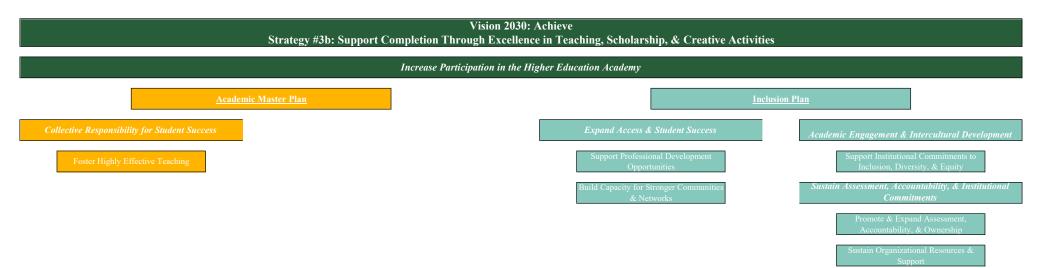


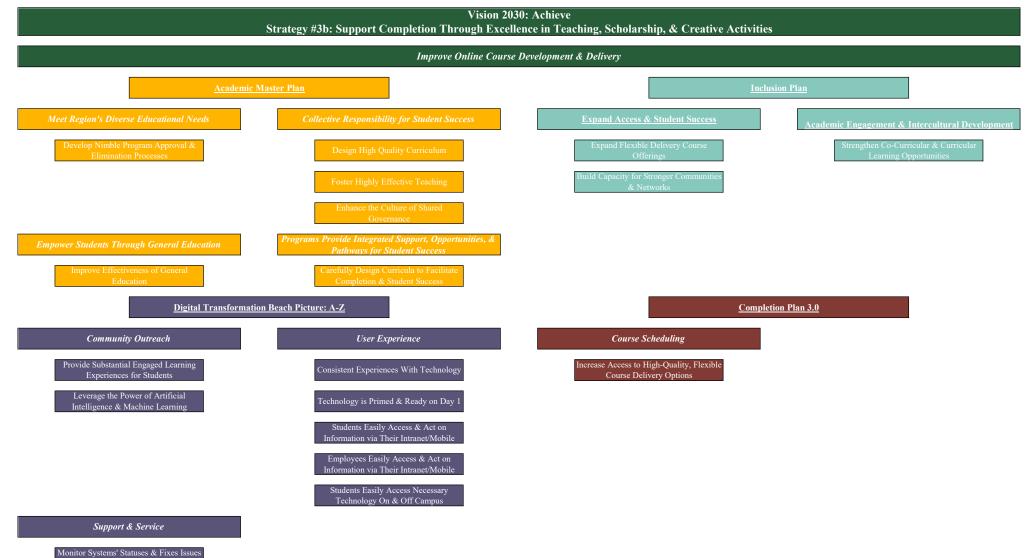




Develop More Inclusive Policies & Practices

evelop & Embed Communications o





Before Users Adversely Affected

