Chapter Six
CRITERION FOUR: PLANNING

“The institution can continue to accomplish its purposes and strengthen its educational effectiveness.”

—Handbook of Accreditation, second edition; a publication of the North Central Association of Colleges and Schools Commission on Institutions of Higher Education

The current environment for public higher education in Ohio and across the nation is increasingly complex and challenging. In earlier chapters of this document, strong evidence is presented demonstrating that The University of Akron is fulfilling its mission and purposes and documenting the many ways in which the institution as a whole and individual units are striving to strengthen educational effectiveness through a focus on student success. Criterion Four investigates the context for institutional planning, the institution’s continuing capacity for decision making, and examples of how strategic planning and resource allocation are repositioning the University for changing times.

The University’s planning efforts, most recently, currently and into the future, can best be described under four primary headings:
- **Vision**: Development of *Charting the Course*
- **Strategic Destination**: Implementation of *Charting the Course* through the Balanced Scorecard Initiative as a framework for institutional and unit-based planning
- **Next Steps**
- **Continuous Quality Improvement**

In September of 1999, President Proenza appointed the Strategic Thinking Steering Committee, a broad-based group co-chaired by Professor of Marketing George Prough and CEO and UA alumnus Kenneth Dickey. The committee reflected a broad cross-section of the campus: central administrators, faculty, staff and students. Its charge was ambitious, encompassing four primary goals slated for completion by June 2000:
- Draft a strategic planning document including the University’s mission statement and value statements with specific goals, measurable outcomes, and resource requirements.
- Outline a more effective process for linking all campus planning and budgeting processes and activities.
o Develop a process for ongoing strategic thinking.
o Propose a series of activities and Continuous Quality Improvement (CQI) initiatives as well as a means of sustaining and growing these initiatives.

To ensure campus-wide participation in accomplishing these goals, the Strategic Thinking Steering Committee employed a number of strategies including retreats, workgroups, web-page planning sessions and periodic updates. Two retreats were held in 2000, each involving more than 175 faculty, staff and students.

**Vision: Charting the Course**

The blueprint for change since 2000 has been *Charting the Course*, which provides a common framework for institution-wide and unit-based planning and resource allocation.

A two-day retreat in September 1999 featured strategic planning expert Michael Dolence exploring the myriad of challenges, opportunities, and new competitors for higher education in the new century.

From that session, enabling or core competencies were defined. They are: people, documented excellence, student success, community engagement and shared leadership. These core competencies represent the special differences and strengths the institution is building upon as the basis for strategic intent.

The following statement of strategic intent frames the vision statement for The University of Akron.

*The University of Akron intends to be recognized as the public research university for northern Ohio. It intends to achieve a prominence in northern Ohio comparable to that which Ohio State has long enjoyed in central Ohio and which the University of Cincinnati has begun to achieve in the southern part of the state.*

Based on the feedback from the Dolence retreat, President Proenza outlined five general strategies:

1. Provide a new landscape for learning, which supports academic endeavors as well as the social and physical needs of students.
2. Improve student success through strategic enrollment management and other efforts.
3. Increase revenues from federal, state, and private sources.
4. Identify distinctive competencies that differentiate The University of Akron from other institutions in northeastern Ohio and across the nation.
5. Gain greater public awareness and appreciation of UA as the premier public university in northern Ohio.

In February 2000, a half-day retreat focusing on customer service featured Dr. Cindy Wheatley, Vice President for Marketing at the Disney Institute. At this session, attendees were seated by unit and completed group exercises employing the Disney approach to exceeding customer expectations.

Beyond periodic retreats, the steering committee also launched an enthusiastic campaign entitled WOW (Wild on Wednesdays). Under this initiative, six work groups were formed and met weekly to tackle key topics: competitive and market changes in education; UA’s distinctive competencies; opportunities; continuous quality improvement; development and assessment of personnel; and innovative budgeting. Nearly 100 faculty, staff and students participated in the weekly meetings from 3-5 p.m. in the student center. By the end of Spring semester 2001, workgroups provided final reports and recommendations that supported steering committee goals. Many of these recommendations have been implemented including a new performance evaluation system for staff and administrators and adoption of key principles to guide development of a new budgeting process.

Another key component of Charting the Course is the identification of four clusters of excellence that communicate the institution’s breadth, diversity and purposes: discovery and innovation, cultural enrichment, community well-being, and economic development. The clusters have provided a clear and powerful way of describing the University’s programs to key public officials, along with forging greater collaboration across the disciplines.

Two priorities and five fundamental strategies have been articulated to guide institutional decision-making and deployment of resources. Above all, enabling student success will continue to be the hallmark of The University of Akron. Moreover, in today’s knowledge economy students must be technologically competent and the University must employ only the best management information systems. Thus, and as a point of comparative advantage, UA will be a leader in information technology. This comparative advantage will be achieved through demonstrated student IT competences, integrated IT for business and academic support, and as a point of differentiation for the University.
In 2001-02, the Balanced Scorecard Initiative was launched to provide the framework for institutional planning. The Balanced Scorecard is a methodology by which operational procedures are aligned with strategic vision. It is a framework that helps organizations translate strategy into operational objectives that drive both behavior and performance. Balanced Scorecards are not static documents. They are not used only to report past performance. Balanced Scorecards are dynamic. They are updated regularly to document and communicate current strategy, objectives, initiatives, performance metrics and targets. Consequently, the method initiates and sustains continuous planning with resultant emphasis on quality improvement.

The methodology of Balanced Scorecard has been adopted to operationalize Charting the Course. This methodology requires that each strategy map, beginning with the institutional strategy map and continuing through the departmental strategy maps, include stated objectives, targets and measures that provide quantifiable goals by which progress and success can be measured. Ultimately, budget allocations will be aligned with institutional priorities.

The concept of “Balance” is an important one. In order to achieve our vision we must balance growth and innovation with cost and efficiency, short term and long-term objectives, internal and external views, and tangible and intangible results. Of most importance, the Balanced Scorecard Strategy map balances vision and implementation. The vision tells us the institutional destination: where we are going; the strategy tells us how we will get there.

The project was begun last fall. Balanced Scorecard methodology involves a Leadership Team that provides leadership, endorsement and vision for the project. The Leadership Team “owns” the institutional scorecard and will make the institutional strategic decision regarding the themes, objectives, measures, targets and initiatives. The Core Team recommends and the Leadership Team decides. Our Leadership Team members are: The President, all of the Vice-Presidents, Dean Roger Creel, Dean Richard Aynes, and Dr. Dan Sheffer, Chair of the Faculty Senate.

The Core Team collects and analyzes the initial data needed to drive the process. The UA Core Team members are: Becky Herrnstein (HR), Brian Davis (business and finance), Julia Philips (student affairs), Gerry Parker (institutional research), Phil Brown (institutional planning), Thomas Calderon (faculty) and Nancy Stokes (provost office).
The Core Team began their job in the fall of 2001 by conducting interviews with a broad base of constituents from the University family. The groups to be interviewed were suggested by the NCA Self-Study Steering Committee and included all vice presidents, the Council of Deans, the Faculty Senate, the Planning and Budgeting Committee of Faculty Senate, academic department chairs, administrative unit department chairs, athletics, contract professionals and staff. Associated Student Government declined the invitation to participate. A set of questions was sent to each person or group and at least one hour was scheduled for each interview. Progress that has been made from the beginning to date is shown in the following timeline.

<table>
<thead>
<tr>
<th>Core Team Timeline</th>
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<tbody>
<tr>
<td><strong>2001</strong></td>
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<tr>
<td>January</td>
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<td><strong>2002</strong></td>
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<td>January</td>
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<td>April</td>
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<td>April 18</td>
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<td>June – August</td>
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<td>October</td>
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<td>November</td>
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<td><strong>2003</strong></td>
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<td>March</td>
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Following the interviews, the Core Team spent over 30 hours codifying, analyzing and synthesizing the information from the original interviews. They reviewed all of the notes from the interviews and created “sticky notes” for each identifiable concept and/or idea. Grouping notes with similar ideas and/or concepts created an Affinity Diagram.
From this grouping exercise, six strategic themes emerged: **Student Success, Differentiation, Research, Information Technology, Communications and Standards**. In Balanced Scorecard terminology, a strategic theme is the way an organization seeks to achieve its vision and mission. It is a set of goals and objectives coupled with a method involving people, resources and processes. A strategy will define what you do and what you don’t do. The definition of each strategic theme reflects the vision/destination “to be recognized as the public research university in northern Ohio” as outlined in *Charting the Course*.

The Balanced Scorecard for a public educational institution provides a view of the organization from five critical perspectives. It is “read” from the bottom up with the “learning and growth” and “internal perspectives” being internal perspectives or things the organization does. The upper three perspectives, “stakeholders,” “financial” and “public” perspectives, are external perspectives or things that the organization delivers.

- **The Learning and Growth perspective** answers the question: “What do we have to have in place to be able to do what needs to be done to satisfy our objectives and the needs of our stakeholders?” It focuses on people, technology and the cultural climate.

- **The Internal Processes perspective** answers the question: “What do we have to do to satisfy the needs of our stakeholders?”

- **The Stakeholder perspective** answers the question: “Who are our stakeholders and what do they expect?”

- **The Financial perspective** answers the question: “How can we realize our objectives and serve the needs of our stakeholders in a fiscally responsible manner?”

- **The Public perspective** answers the question: “How will the public know when we have achieved our destination?”

The Core Team again synthesized all of the individual sticky notes for each perspective and charted a draft of the institutional map. This draft was presented to the Leadership Team on April 18 and has been approved as the official strategy map for The University of Akron.
The dynamism of the BSC methodology is emphasized by the iterations of the Strategic Destination as presented in the institutional strategy map. (Please see Appendix E for the map.) Following the April approval of the institutional strategy map, the strategic destination has been refined four times by vice presidents, deans and the Leadership Team. The final version of the strategic destination has been agreed upon and supported by the university constituencies.

Within three years, The University of Akron will be recognized as the public research university for northern Ohio, the university devoted to the education and success of its students and to the production, integration and dissemination of knowledge for the public good.

Actualization of the strategic destination is accomplished by the identification and establishment of objectives, measures, targets, and initiatives. Our institutional objectives for each of the six strategic themes can be seen in the following chart.

<table>
<thead>
<tr>
<th>STUDENT SUCCESS</th>
<th>Strategic Map</th>
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<tbody>
<tr>
<td>Provide opportunity for educational success for all students</td>
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<tr>
<td>Increase 1:1 faculty-student involvement leading to high-profile awards</td>
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<tr>
<td>Students/alumni are satisfied</td>
<td></td>
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<tr>
<td>Students/alumni are well-educated</td>
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<tr>
<td>Students/alumni are well-compensated</td>
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<tr>
<td>Students/alumni contribute to society</td>
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<tr>
<th>DIFFERENTIATION</th>
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<tr>
<td>Leverage specific points of differentiation</td>
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<tr>
<td>Create unique institutional identity</td>
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<tr>
<th>RESEARCH AND SCHOLARSHIP</th>
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<tbody>
<tr>
<td>Generate, share and, where possible, apply new knowledge and discovery</td>
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</tr>
<tr>
<td>Develop focused research and scholarship programs that may result in applied opportunities and economic development</td>
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<tr>
<th>INFORMATION TECHNOLOGY</th>
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<tbody>
<tr>
<td>Develop student competitive advantage</td>
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<tr>
<td>Leverage IT for operational excellence</td>
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<tr>
<td>Document our excellence through IT</td>
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<table>
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<tr>
<th>COMMUNICATIONS</th>
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<tr>
<td>“Tell the story”</td>
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<tr>
<td>Provide open, timely and accurate information</td>
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<tr>
<th>STANDARDS</th>
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<tbody>
<tr>
<td>Uphold high standards of achievement and accountability for students, faculty, staff, and contract professionals.</td>
<td></td>
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<tr>
<td>Provide opportunity to at-risk students to achieve the standard</td>
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</table>
Completed templates for institutional and administrative objectives, measures, and targets may be accessed at:
http://www.uakron.edu/facstaff/bscMore.php

The next steps are to cascade the institutional scorecard through all the levels of the institution. The first level of cascading was the administrative unit level; each administrative unit created their own strategy map, objectives, measures and targets that align with the institutional strategy map.
http://www.uakron.edu/facstaff/unitMaps.php

In the academic area, the Office of Senior Vice President and Provost created two strategy maps to reflect the bipartite charge of the vision of the institution – teaching and learning and research and scholarship. Each College, and in some cases departments within colleges, is developing aligned strategy maps. In the end, the Balanced Scorecard will form the structure and guidelines for a more traditional academic strategic plan. Approaching our academic planning process in this way will result in a more focused and reality-based academic plan. The institutional strategy map, objectives, measures and targets provide the unifying vision and destination for the University as a whole; the departmental strategy maps provide the detail through prioritization of efforts in support of the institutional destination. The result of the alignment of specific departmental unit goals with the greater goals of the institution is that each constituency participates in, strives toward and supports the same vision. Although the institutional vision broadly addresses the mission of the institution as a whole, it provides the single focal point for each and every administrative, academic and support unit.

The Balanced Scorecard methodology sets the path for change. Academic strategic plans, and institutional plans in general, have often been based on five-year cycles. The Balanced Scorecard timeline shortens that time period to three years and calls for annual reevaluation through the setting of new targets every year. The target for each objective is measured each year and new targets are projected for the third year in the future. This simple exercise results in continuous quality improvement through the measurement and evaluation of all institutional, as well as departmental, goals and objectives each and every year.
The University of Akron’s capacity for change is evidenced in many ways at the unit and institutional levels. The Balanced Scorecard approach requires data-driven decision-making in a fiscally responsible manner. The result is that scarce resources are being stretched and reallocated to fulfill purposes and needs of their students and other constituencies. At an institutional level, this capacity is evidenced most strongly by five critical initiatives: (1) design and implementation of enrollment management and student retention strategies; (2) commitment to assessment of educational effectiveness; (3) diversification of revenues; (4) creation of a new technology infrastructure; and (5) development of the New Landscape for Learning and Landscape for Living.

Given that 93 percent of general fund revenues relate directly to student enrollment through instructional subsidy earned or tuition fees collected, enrollment is inextricably linked to the institution’s financial health and well being. In demonstration of the clear institutional priority of enrollment management, Mr. William Nunn was hired as Associate Vice President for Enrollment Services in August 2002.

Through a multifaceted strategic enrollment management plan, the following objectives have been achieved:
- The 10-year enrollment decline has been turned around.
- A record number of first-time freshmen enrolled in Fall 2001.
- Attendance at recruitment events is at an all-time high.
- The number of first-year honors students has doubled.

With student service as the top priority, current efforts focus in three areas: data collection and application, financial resources, and physical resources.
- Data analysis strategies are being planned in collaboration with the Office of Institutional Planning.
- Enrollment projection models are being developed.
- Tracking systems are being implemented to analyze admissions processes.
- Admissions events are being monitored carefully to understand their impact on enrollment patterns.
- Tracking systems are being implemented to analyze registration patterns.
- Course availability models are being developed to proactively plan needed course sections.
- Market research activities have been initiated in collaboration with Institutional Marketing.
Enrollment management is becoming a part of the budgeting process.
- Financial aid leveraging models are being developed to better understand competing institutions.
- Student financial assistance award packages are reviewed regularly to determine their effectiveness in attracting and retaining students.
- New scholarship programs are being created to effectively recruit top students.
- The University awards over $7 million in scholarships to recruit talented students and provides more than $121 million in financial assistance from all sources.

The capital enhancement program (New Landscape for Learning) strategically includes three new buildings central to enrollment management: student center, student recreation center, and student services building.
- Approximately $25 million was invested to renovate five residence halls in recognition of their key role in enrollment management initiatives; additional renovations are planned in the near future.
- Plans are in progress to build additional residence halls and to develop a new Greek Village to enhance recruitment and retention efforts.

Retention of students has been emphasized through the following objectives:
- Reflecting research that documents the positive relationship between on-campus employment and student retention, many students are encouraged to work on-campus.
- Reflecting research that documents the positive relationship between co-curricular involvement and student retention, many opportunities have been developed for co-curricular participation with more than 200 student organizations officially recognized.
- Timely notification of continuing financial assistance awards is a top priority.
- Learning communities, demonstrated nationally as a highly effective tool for increasing student retention, are available through Residence Life and Housing in collaboration with academic departments.
- Reflecting the research that indicates that living on campus increases first-year retention, the Freshman Residential Requirement ensures that first-year students live on-campus.
o The University’s Residence Life and Housing programs are recognized nationally, as evidenced by a variety of awards, for their excellent student development programs.

o Counseling services (career and personal) are provided to assist students with transition issues, personal concerns and academic difficulties.

o The financial services provided by Student Financial Aid include financial planning and short-term emergency loans, as well as assistance in completing the forms required for institutional, state and federal financial assistance.

o Recreational and wellness programs are available for students.

o The Academic Achievement Programs target low-income and/or first-generation college students and provide programs to increase their likelihood of success in post-secondary education and their awareness of and interest in attending college.

o Web services have been designed to provide interactive services to assist students in learning more about the University and to enable students to conduct business on-line.

Overall, the comprehensive nature of the enrollment management plan holds promise for increasing and maintaining student enrollments, which will both meet the goal of student success and ensure the intellectual vitality and financial health of the institution.

As detailed in Chapter 5, assessment of educational effectiveness is a clear priority. The Office of the Senior VP and Provost provides an annual budget of approximately $50,000 for academic assessment activities. The University-wide Student Assessment Task Force (SATF) is charged with determining the institution’s assessment needs, reviewing current assessment activities, and proposing new initiatives to improve student learning, retention, satisfaction and success. For example, the SATF proposal that the University take part in the National Survey of Student Engagement (NSSE) was acted upon in Spring 2002; further, SATF advised Institutional Planning on sampling strategy. The NSSE was co-sponsored by Academic Affairs, Student Affairs, and Institutional Planning.

Similar committees and task forces work at the college and departmental levels. The work of the College of Education’s college and departmental assessment committees was validated in Fall 2002 through NCATE accreditation. In another example, the Department of Sociology is engaged in a systematic, long-term effort to assess its curriculum and instruction.
Reflecting the fiscal responsibility embedded in the Balanced Scorecard approach, diversification of revenue is recognized as essential to the continued fiscal health of the University. Since 1997, the University has been successful in attaining increased outside funding in the form of research grants, other sponsored programs and private gifts, evidencing strong support of external stakeholders. The examples cited below are not inclusive but rather illustrative of the creative and comprehensive ways in which the institution is seeking to and succeeding at broadening its financial base.

At the time of the last NCA visit, attaining classification as a Research II institution (a designation no longer employed as a classification by the Carnegie Foundation) was identified as a strategic priority of the institution. The first clause of the strategic destination of the current institutional strategy map redefines that goal as: The University of Akron will be recognized as the public research university for northern Ohio. At the end of the last fiscal year, the dollar level was up by 20 percent from FY96-97 levels. Since FY 1997, The University of Akron’s sponsored program funding has increased 20 percent. In the current 2001-2002 year-to-date—when compared to fiscal year 2000-2001—funding dollars are up by approximately 40 percent. The number of proposals submitted has increased by 34 percent. The University has undertaken concerted efforts to increase the level of external funding for research and other sponsored programs. Increased funding has been received from federal, state, foundation and corporate sponsors. In light of priorities recently set by the State of Ohio, opportunities exist to increase support from state initiatives for the widely recognized excellence of UA’s science and technology programs, particularly in polymer science and polymer engineering. Details of grant funding are provided in chapter 4.

The University of Akron Research Foundation was established this year to promote development of research relationships and the commercialization of University technology. This non-profit organization, based on models that have been successful in other academic institutions, exists for the sole purpose of enhancing the University’s research mission. As an entity organized solely for that purpose, interactions with sponsors such as contract negotiations, license agreements, creations of “spin off” companies will be streamlined.

Increased collaborative projects with other universities, research centers and healthcare organizations have been initiated. Local industries, such as Goodyear Tire and Rubber Company and
Timken, are strong financial supporters through endowments, scholarships and building constructions.

More recently, The University of Akron has partnered with OMNOVA Solutions, Inc. to provide industrial assistantships for graduate students. These partnerships help both the University and the community by generating revenue for various programs and providing the community with well-trained graduate students.

Fund raising remains healthy in spite of the sagging economy and September 11. In 2001-02 the University recorded total giving of $24.8 million, up 52 percent from the yearly average of $16.3 million for the previous five years. The number of gifts received also rose by 14 percent from a total of 16,047 in 2000-01 to 18,292 gifts last year.

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<tr>
<th>FISCAL YEAR</th>
<th>TOTAL AMOUNT GIVEN</th>
<th>TOTAL # of GIFTS</th>
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<tr>
<td>FY97</td>
<td>$8,029,619</td>
<td>18,085</td>
</tr>
<tr>
<td>FY98</td>
<td>$15,192,045</td>
<td>18,225</td>
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<tr>
<td>FY99</td>
<td>$15,457,956</td>
<td>17,575</td>
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<tr>
<td>FY00</td>
<td>$15,591,118</td>
<td>18,282</td>
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<tr>
<td>FY01</td>
<td>$27,412,373</td>
<td>16,047</td>
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<tr>
<td>FY02</td>
<td>$24,818,394</td>
<td>18,292</td>
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Consistent with the vision of Charting the Course and the strategic themes outlined in the Balanced Scorecard Initiative, funding for technology infrastructure is essential. The state of the art in computers and associated technology is one of a dynamic nature.

Application Services in the VP/CIO division develops and supports enterprise-wide computer application systems. These systems provide UA students, faculty, staff and other stakeholders with innovative and high-quality integrated business applications, data management and technical support, decision support and management information, and website development and management. Technology is employed in a manner that provides a wide range of educational opportunities on and beyond our campus, enables student success, provides only the best management information systems available and attains technological excellence to create a competitive advantage for our students, faculty and staff. Two such projects are the PeopleSoft implementation and WebCT.

The enterprise business application form PeopleSoft is an integrated system that includes Student Administration and Financials. With this implementation, the University moved from
a “data-rich, information poor” institution to one that provides management information for decision-making.

An even larger and more critical project is the implementation of an academic enterprise system developed in partnership with Web CT. Academic enterprise systems deliver teaching and learning tools, course content management capabilities, personalization of the learning experience, and learning information management.

The Office of Institutional Planning, Analysis, Reporting and Data Administration provides accurate and timely information to support institutional decision-making by analyzing, interpreting and disseminating institutional data. The University Fact Book is produced in this office.

The University of Akron has embarked upon an ambitious $200 million campus Master Plan, A New Landscape for Learning, approved by the Board of Trustees upon recommendation of President Proenza in 1999. The fundamental underlying strategies are as follows: (1) to attract and retain a higher quality and more diverse student body, faculty and staff; (2) to increase student retention; and (3) to improve the quality of student life. The specific goals of the Master Plan are to (1) create a long-range vision for a user-friendly and aesthetically appealing campus; (2) to clarify the physical structure of the campus; and (3) to identify sites for future buildings. Projects include student activities, parking structures and landscape improvements.

As of this writing, progress has been swift, on time and within budget:

- The first of three new parking decks opened in Fall 2001, adding 1,000 spaces with convenient highway access. Construction began this summer on the second deck that will service the central campus core.
- The Arts and Sciences Classroom and Office Building opened in July 2002.
- The addition to the Science and Engineering Library opened in Fall 2002.
- Completion of the Student Center (Phase I) was completed December 2002; Phase II construction began January 2003.
- Groundbreaking for the Student Recreation Center occurred in the spring of 2002 and construction is proceeding rapidly.

The New Landscape for Learning capital plan is financed by a combination of state capital dollars and student facility fees that
funded a large bond issue. After exhaustive studies, the major rating agencies—Moody's and Standard and Poor's—affirmed previous UA ratings of A2 and A, respectively. Like the University's consistent ability in receiving clean audit opinions since becoming a state-assisted institution in 1967, its recent success in garnering support from the financial community for these latest bonds testifies to the financial community's trust in the University's institutional financial practices.

Implications for increases in utility and maintenance costs and constraints upon enlarging other parts of the student revenue stream have been carefully discussed by senior leadership and deemed appropriate given current projections. In addition to new buildings, renovations to existing buildings and demolition of outdated structures will reduce deferred maintenance costs associated with these structures. For 2002-03, the PBC recommended an additional $540,000 to support increased utilities and maintenance costs related to the plan.

The University of Akron, like all higher education institutions, faces both opportunities and threats on the horizon. Generally, there is a culture of bringing issues and problems to the fore, whether by the administration or by the various constituency groups, that forges compromise and resolution. While the process may not always be pretty or neat or without disagreement, the institution has demonstrated a healthy capacity for debate, deliberation and flexibility.

**STRENGTHS, CHALLENGES AND FUTURE PLANS**

**STRENGTHS**

- The University has a well-developed planning process to aid in carrying out its mission.
- Many of the individual academic units have detailed plans in place and are integrating them into the Balanced Scorecard methodology.
- A commitment to bringing issues and problems to the fore, whether by the administration or by the various constituency groups, that forges compromise and resolution.
- The Balanced Scorecard Initiative is well formulated and functioning.
- Shared Leadership.
- Broad capacity and input into decision making.
- Established objectives, measures and targets for each of the institutional and administrative unit strategic themes.

**Conclusion**
- Enrollment manager in place.
- Implementation of enterprise resource planning system and data warehouse.

**CHALLENGES**
- Building a culture of bringing issues and problems to the fore, whether by the administration or by the various constituency groups, that forges compromise and resolution.
- Commitment to the Balanced Scorecard Initiative among all constituents.
- With the implementation of the data warehouse, choosing and using this information in decision making processes.
- Balance between rights of the individuals, such as privacy, and openness; between incentives and ethics, such as those involved in intellectual property.
- The Planning and Budgeting Committee of Faculty Senate is so involved in budgeting issues that it rarely finds time to address planning issues.
- Managing the costs of technology.

**FUTURE PLANS**
- Focusing on Continuous Quality Improvement initiatives to enhance University excellence.
- Working to develop a culture of bringing issues and problems to the fore, whether by the administration or by the various constituency groups, that forges compromise and resolution.
- Attaining consolidation and consistency, and remaining up to date with regulations.
- Cascading the Balanced Scorecard.
- Continuing to develop and implement data-driven enrollment management strategies.
- Continuing to develop and implement data-driven student retention strategies.
- Continuing to develop and implement data-driven assessment strategies.
- Continuing to develop and implement data-driven diversification of revenue strategies.
- Implementing the academic enterprise system.