

Matrix for Advancing UVM for FY '04

I Create a diverse community

Action Steps	Champions	Milestones	Target Dates	Outcome
(i) Develop and implement plans throughout the institution to recruit and retain faculty, staff and students from under-represented groups.	Fogel, Bramley, Coleman*, VPs, Deans, Chairs and Unit Heads	Pursue work of multiple task forces and commissions	Ongoing	<p>President's Task Force Racial Diversity met regularly throughout FY 04 along with several subcommittees; recommendations were developed, approved by the Provost and President, and promulgated to the campus on five key measures of student diversity, faculty and staff diversity, retention, campus climate, and curriculum development. Detailed recommendations on recruitment and retention have been submitted by the Task Force and are now under review by the administration. Recommendations on curricular matters have been developed in detail and are still under deliberation by the Task Force. In addition, a comprehensive campus climate survey (to gauge the current climate and set a baseline for measuring change) is being developed.</p> <p>President's Commission on the Status of Women met regularly throughout FY 04</p> <p>President's Commission on Campus Climate for President's Commission on the Status of Women met regularly throughout FY 04</p> <p>President's Commission on Campus Climate for Lesbian, Gay, Bisexual, and Transgendered Members of the University Community officially charged November 2003 and met regularly for the balance of FY 04</p> <p>President's Task Force on Diversity and Inclusion in the process of being established - first meeting May 2004. Role of Task Force is to serve as an umbrella structure to other commissions and task forces and to focus on special groups not represented in existing commissions and task forces</p> <p>Appointed new Executive Director of Affirmative Action</p>
		Create the Martin Luther King Action Award to recognize exceptional efforts of faculty, departments, programs or staff in achieving the University's goals of fostering a multicultural community	February 1, 2004	Working with Service Learning to restructure MLK Day events by participating in a service program in support of his ideals - implement January 2005

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		Design a UVM diversity publication with broad appeal that highlights campus wide diversity opportunities for student, both credit and non credit	March 1, 2004	Ongoing - gathering material for inclusion in publication Plan to publish FY 05
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Matrix for Advancing UVM for FY '04

I Create a diverse community - Continued

Action Steps	Champions	Milestones	Target Dates	Outcome
(i) Develop and implement plans throughout the institution to recruit and retain faculty, staff and students from under-represented groups. - Continued	Fogel, Bramley, Coleman*, VPs, Deans, Chairs and Unit Heads - Continued	Develop and implement exit interviews for tenure-track faculty	Administer May 2004, evaluate July 2004	Process will be completed May 2004
		Establish effectiveness in recruiting and retaining diverse faculty, etc., as an accountable criterion in all reviews of Deans and Chairs	May 1, 2004	Currently in discussion with the Office of Affirmative Action and the Vice Provost for Academic and Faculty Affairs
		Ensure institutional support for the Henderson Scholarship program	May 1, 2004	Restructured program and ensured ongoing support
(ii) Strengthen multicultural curricular opportunities.	Bramley, Coleman*, Deans, and Faculty Senate	Sponsor a curriculum diversity workshop for faculty	April 1, 2004	Program sponsored through Center for Cultural Pluralism - Fall Semester Second Program planned for June 2004
		Establish relationships with organizations such as the NYU Faculty Resources Network that provide faculty enrichment and development opportunities	January 1, 2004	Officially joined NYU in October 2003 In the process of exploring another partnership in an organization focused on the sciences
		Expand our current New England Board of Higher Education/Henderson Fellows relationship to include other consortium fellows as potential hires	January 1, 2004	Program currently under review with a decision expected Fall 2004
(iii) Develop institutional practices and policies that foster a culture of inclusion, openness, and collaboration among administrators, faculty, staff, and students.	Fogel, Bramley*, VPs, Deans, Chairs and Unit Heads	Develop communication between Provost, Deans, Faculty Senate and Student Government Association	Ongoing monthly meetings	President and Provost held two campus forums on the University Vision President held six open "Coffees" with students throughout the year Bi-weekly meetings held with the Council of Deans Provost met monthly with the Faculty Senate Executive Committee and various committees upon request Provost met on an ad hoc basis with Student Government Association and groups of students around specific topics

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I Create a diverse community - Continued

Action Steps	Champions	Milestones	Target Dates	Outcome
(iii) Develop institutional practices and policies that foster a culture of inclusion, openness, and collaboration among administrators, faculty, staff, and students. Continued	Fogel, Bramley*, VPs, Deans, Chairs and Unit Heads Continued	Distribute academic unit performance data	Unit data available December 2003	Academic unit performance data - distribute Fall 2004 Data posted for all units posted on the Office of Institutional Studies website
		Continue implementation of modified Academic Review Process with Memorandum of Understanding	Academic Program Review process underway	Held eight MOU meetings regarding Academic Program review during FY 04 Completed three MOU agreements with several pending Plans underway for several MOU meetings during summer 2004
(iv) Ensure that institutional policies and expectations are consistent with and promote the climate and community enshrined in "Our Common Ground".	Fogel, Bramley*, VPs Dean, Faculty Senate, Staff Council, Chairs and Unit Heads	Review revision of policies on a continuing basis, including revision of "Our Common Ground Review"	June 2004 for first round of review/revisions	Several policies reviewed by the President's Senior Leadership and disseminated to the University community Process ongoing

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II. Create an outstanding student experience that promotes personal and intellectual development

Action Steps	Champions	Milestones	Target Dates	Outcome
(i) Increase residential life housing capacity, renovate existing facilities, enhance physical attractiveness, and create living/learning communities.	Gustafson*, Parke, Nestor, Stevens, Faculty	Complete permit process and break ground - Catamount Apartments (203)	March, 2004	Awaiting State resolution of ground water policy issue
		Complete permit process and break ground - University Heights (+/-800)	March, 2004	Completed permit process and anticipate breaking ground May/June 2004
		Renovate Living and Learning residence halls	May, 2004	On track to begin renovation of first building summer of 2004
		Renovate Family Student Housing (expected completion September 2005)	September 1, 2005	On track to be completed in 2004
		Confirm 2nd phase of Residential Life Master Plan	May, 2004	Deferred pending completion of the feasibility study
		Engage Provost and key faculty in developing action steps for a Residential College system	October, 2004	Honors College residential component on track for Fall 2004 Ongoing planning for additional residential colleges in new residence halls
		Complete the physical and programmatic design of the Residential Honors College Model	May, 2004	On track to be completed in Fall 2004
(ii) Assess the quality of the traditional and non-traditional student experience and take appropriate action, assuring accountability of faculty, staff, and students.	Gustafson, Bramley*, Nestor, Parke, Carr, P. Brown, Stevens, Deans	Sponsor focus groups - complete summary of findings (Dean of Students Office)	September, 2003 - April, 2004, July, 2004	Completed focus groups
		Develop a master plan for Dining Services	May, 2004	Process is underway and expected to be completed by December 2004
		Assess the needs of off-campus students and recommend a service delivery infrastructure	April, 2004	Process completed
		Redesign and distribute Student Safety and Health Referral Information for faculty advisors	December 1, 2003	Process completed
		Conduct an advising evaluation and senior survey	May 1, 2004	Ongoing
		Conduct campus climate survey and develop action steps for implementation pertaining to Student Services	June, 2004	Ongoing
		Pilot a first-year experience course and assess its educational and retention outcomes	September - January 2004	Course successfully offered

Matrix for Advancing UVM for FY '04

II. Create an outstanding student experience that promotes personal and intellectual development - Continued

Action Steps	Champions	Milestones	Target Dates	Outcome
(iii) Create programs that build community and school spirit, including pursuit of a strong and winning athletic program	Fogel, Bramley, Gustafson*, Nestor, P. Brown, Corran	Enhance campus communication systems to increase student awareness and attendance at programs and athletic events	January 1, 2004	Expanded communication to university community regarding programs and athletic events
		Hire programming coordinator to enhance the consistent implementation of late night programs	September 15, 2003	Program Coordinator hire September 2003
		Complete strategic planning process in the Athletic Department to integrate program vision, mission, and strategic directions with a broader University mission and vision	April 1, 2004	Strategic Plan completed for Athletic Department and presented to the Academic and Student Programs Committee of the Board in March 2004 Plan implementation ongoing
		Develop an integrated understanding and approach to the arts	May 1, 2004	Planning underway for Fall 2004 to appoint a committee to recommend ways to integrate the arts broader in the University life
		Revise Athletic Department organizational structure to increase operational effectiveness	December 2003 and ongoing	Completed Athletic Department reorganization Fall 2003
		Develop opportunities/mechanisms for alumni and community involvement in the athletic program	December 2003 and ongoing	Created the "Victory Club", a membership organization designed to enhance support and establish stronger ties between alumni/community and Athletics A number of very successful events were held in conjunction with athletic contests throughout the year
		Enhance event entertainment activities in selected varsity sports	January 2004 and ongoing	Event promotion at every Hockey and Basketball game this year Chair "give away promotion" during the Men's Soccer Season in the fall Student Appreciation Day in the spring New sound system in Gutterson Field house and a new mascot
		Organize student-based promotional activities in selected varsity sports	January 2004 and ongoing	Several promotional events were held to increase attendance at athletic events, including 500 Cat Pride t-shirts given away, Jet Blue Spring Break Promotion, special student only seating at contests, dedicated bus transportation to Centennial Field for home soccer games, and special pep rally prior to America East Men's Basketball Championship

Matrix for Advancing UVM for FY '04

II. Create an outstanding student experience that promotes personal and intellectual development - Continued

Action Steps	Champions	Milestones	Target Dates	Outcome
(iv) Provide undergraduate students with opportunities for rigorous and challenging experiential learning, including research, volunteerism, and service-learning from the outset of their academic programs.	Gustafson, Bramley, Parke*, Deans	Finalize the creation of a program or center for service-learning	Fall 2003	The Office of Community-University Partnership created and staffed beginning October 1, 2003
		Develop faculty based career path planning program for new students via Career Development/Center for Teaching and Learning collaboration, so as to infuse career development into the fiber of the student experience.	FY 2004 for pilot program; ongoing if pilot is successful	Conducted two workshops for faculty in conjunction with the Center for Teaching and Learning regarding student career development
		Strengthen internship and coop opportunities	Ongoing	150 new internship and coop opportunities were created
		Merge community scholars program and activities into the Honors College	September 1, 2003	The community scholars program was moved to the Honors College at the start of fall semester 2003
		Work with the appropriate Faculty Senate committee to modify the Undergraduate Research Endeavors Competitive Awards (URECA) program to include service-learning opportunities	FY 2004	Delayed until FY 05
		Collaborate with Student Affairs to strengthen outreach and engagement	Ongoing	Process underway
(v) Foster positive changes in student culture and behavioral norms.	Gustafson*, Bramley, Student Government Association, Senate, Deans	Develop and implement a Student Assistance Program for the final 2 years of the Robert Wood Johnson grant	December 1, 2003	Program developed and implemented - Fall 2003
		Submit revised Academic Honesty Policy to the Faculty Senate for approval	October, 2004	Revised policy submitted and under review by Faculty Senate
		Develop a model for peer education and implement a "Culture of Care" campaign for student-to-student assistance	May, 2004	Model developed and "Culture of Care" campaign implemented

Matrix for Advancing UVM for FY '04

III. Focus the human, fiscal, environmental, technological and physical resources of the University on institutional values and priorities

Action Steps	Champions	Milestones	Target Dates	Outcomes
(i) Create and implement comprehensive master plans for facilities and technology utilizing consultants Ayeres Saint Gross.	Gustafson, Gower, Vaughan, Ballard* (facilities)	Establish Master Planning Committees - Working, Steering and Community - identify key issues	November 30, 2003	Committees were established and met with planning consultant; however, continuing efforts are delayed due to the withdrawal of the planning consultant
		Update land use planning principles and premises	January 31, 2004	Ongoing - delayed due to withdrawal of planning consultant
		Complete refinement of key issues for both facilities and land use plan.	June 30, 2004	Ongoing and on target to be completed by June 30, 2004
		Finalize space benchmarking analysis of peer and aspirants	January 31, 2004	In progress with an expected completion date of September 1, 2004
		Finalized space utilization by college/school	May 31, 2004	In progress with an expected completion date of December 1, 2004
		Expand classroom technology coordination scope to include assessment of classroom and other learning facility physical condition and improvement needs	May 1, 2004	Expanded the scope of the committee to include the physical infrastructure of the classroom, furnishings, and technology. Proposal forthcoming Fall 2004
	Bramley, Saule* Gower (IT)	Complete IT asset inventory and analysis	November 15, 2003	IT asset inventory completed December 2003
Complete first draft of IT master plan and distributed		May 1, 2004	Revised completion date - December 2004	
(ii) Develop and implement a plan for appropriate institutional growth related to student population and the corresponding alignment of faculty and staff.	Bramley* (faculty, students, academic support staff)	Complete feasibility analysis	February 1, 2004	Feasibility Study completed and presented to Board of Trustees May 2004
		Incorporate academic unit ratios in position control	FY05	Academic unit ratios were established and included in the strategic budgeting process and the feasibility study
	Gower, Bramley*, deGroot (Admin. and other staff)	Develop budget model and make adjustments to process	FY05 and beyond	Budget hearing process developed for FY 06 for all academic and administrative units
		Integrated enrollment plan into budget process	FY05 and beyond	Budget hearing process linked to strategic planning process

Matrix for Advancing UVM for FY '04

III. Focus the human, fiscal, environmental, technological and physical resources of the University on institutional values and priorities - Continued

Action Steps	Champions	Milestones	Target Dates	Outcomes
(iv) Develop and enhance revenue sources from delivery of instruction in non-traditional formats and/or outside the fall and spring semesters (e.g., enhanced summer term/programs, executive education, executive M.B.A. program with differential tuition, distance learning, etc.)	Bramley, Parke*, Belliveau, Vallett, Deans, Faculty	Complete summer conference study	October 1, 2003	Study was completed and submitted to senior administration Process underway to hire a Director of Conferences - anticipated completion July 2004
		Continue current exploration of possible January term (J-Term) web-based course offering	September 1, 2004	On target for trial offering beginning January 2005 Use of Cyber Courses and study abroad courses sponsored by UVM faculty being developed
		Continue the development of "Cyber Summer" via strengthening of Continuing Education/Center for Teaching and Learning/Digital Media Development Lab collaboration	Ongoing	CTL and DMD Combined into one unit Number of courses for Summer 2004 remained constant
		Accelerate exploration of alternative delivery methods (i.e. Web based) for certain components of existing day courses	Ongoing	Significant increase in alternative delivery methods achieved through support from the Davis Grant Sixteen large lecture classes now include online curricular components including lecture to lab video project in Chemistry, Biology 1 and 2, Physics, Geology, etc. State of the art technology enhancement by way of motion capture Technology Select Engineering courses utilizing computer "tablets" technology
		Initiate task forces to study viability of executive development programs in areas such as business and public administration	Create task force in each of next three years	Continuing Education and the School of Business Administration collaborated to create Vermont Business Center - first course offered January 2004
		Reexamine the role of the campus-based television studio and related facilities	FY 2004, decision by August 1, 2004	In progress

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III. Focus the human, fiscal, environmental, technological and physical resources of the University on institutional values and priorities - Continued

Action Steps	Champions	Milestones	Target Dates	Outcomes
(v) Create and fully implement a process that drills down through all levels of the institution the development of plans and objectives with time-bound performance indicators	Bramley*, University Planning Council, VPs, Deans, Chairs and Unit Heads, Faculty and Staff	Implement University Planning Council unit and departmental planning process underway	September 1, 2003	UPC met regularly throughout the academic year Academic and Administrative unit strategic plans submitted to UPC for review with feedback provided to unit heads Departmental strategic plans submitted to unit heads and forwarded to UPC - UPC decided that review of department plans was the role of the unit head. Approximately 100 departmental plans were submitted
(vi) Develop mechanisms for implementing and documenting differential resource allocations based upon support of institutional priorities and performance.	Fogel, Bramley*, Gower	Use performance metrics for academic units in revised budget model.	December 1, 2003	Budget hearing process expects academic unit heads to connect requests for FY06 to the unit's performance metrics
		Develop performance criteria for non-academic units as prelude to similar process	March 1, 2004	Delayed until Fall 2004
(vii) Develop and implement plans for positioning and promoting the University with a consistent and coordinated graphic identity and web presence	Gustafson, Corredera*	Develop series of key print and Web communications tools that exemplify the new design and serve as models for future design work	Ongoing	Primary tools, including viewbook, campaign case statement, and top levels of UVM website are complete
		Create print graphic design style guide, based on research and positioning statement for the University	October 1, 2003	Web style guidelines complete and distributed to appropriate units
		Create web design style guide, based on research and positioning statement	June 15, 2004	Proposal was accepted and an implementation team selected

Matrix for Advancing UVM for FY '04

IV. Recruit and retain excellent students, faculty and staff.

Action Steps	Champions	Milestones	Target Dates	Outcomes
(i) Design and develop first-rate academic advising programs.	Parke*, K. Williams, Deans, Faculty	Implement Career Development Initiative	Fall 2003	Career Services and Center for Teaching and Learning collaborated to introduce faculty to the career development process and the services that support the UVM students, and to encourage faculty to use this information in their advising and curriculum development
		Improve number and scope of employers posting jobs and internships	Ongoing	Career Services assessed student interests and contacted over 100 new employers yielding 250 new companies that are actively recruiting UVM students
		Develop and implement Phase 1 of the Career and Faculty Bridge Program	Spring 2004	Developed information packets for faculty Career Services contacted, in person or by phone, 25 faculty members to deliver information and encourage collaboration
		Continue testing, refinement and implementation of the Degree Audit Reporting System (DARS)	Spring 2004 trial application ; full implementation spring 2005	Tested in two units Spring 2004, full implementation anticipated for registration in November 2004 for Spring 2005 classes
		Explore the viability of professional advising program - First-Year Experience Committee	FY 2004	First-Year Committee decided to delay this in lieu of mid-semester warning letters and Pathfinder Program Professional advising model under consideration in FY 05
		Utilize Honors College advising to model experimental improvements in general advising activities	Ongoing as Honors College Develops	Process of Honors College advising is currently being developed for implementation beginning Fall 2004 with possible broader use at a later time.
		Promote effective advising through use of strengthened measurement of advising in the faculty "green sheet" process	FY 2004, 2005, 2006	Revised advising guideline in place May 2004; will continue the evaluation process
(ii) Improve career and academic planning services and programs and connect these services more effectively to academic units and programs.	Gustafson*, Parke, Gardner, Deans, Carr, Saule	Design and implement a common student service web-based interface	September 1, 2004	In feasibility study phase, in context of web process analysis
		Assess information technology needs and support for students, focusing on the first-year experience	May, 2004	Student survey completed April 2004, data being compiled
(iii) Assure faculty accountability for creating an academically rigorous environment.	Bramley, Youngblood*, Deans, Faculty Senate	Introduce outcomes-gauged "academic rigor" as a criterion for evaluating teaching in Review, Promotion and Tenure decisions	For implementation in the FY 05 RPT cycle	Delayed for FY 06 implementation

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IV. Recruit and retain excellent students, faculty and staff. - Continued

Action Steps	Champions	Milestones	Target Dates	Outcomes
(iv) Reward excellent performance, enhance competitiveness of compensation for faculty and staff, and improve the quality of the professional environment.	Bramley, Youngblood*, Deans, Faculty Senate	Reconstitute the University Committee on Research and Scholarship (UCRS) grant program (restricted to junior faculty if shortfall in funding necessitates it)	July 1, 2004	Decision made to not proceed because of the Graduate College's decision to increase graduate student stipends
		Develop a plan to increase the Professional Development Fund	July 1, 2004	Decision made to not proceed because of the Graduate College's decision to increase graduate student stipends
		Determine the effectiveness of the Faculty Mentoring program through a comprehensive assessment	May 1, 2004	Scheduled for Summer 2004 in conjunction with Faculty Senate
	Bramley*, Gower	Implement reclassification system for staff	June 1, 2004	Employee reclassification system underway Support class completed and professional class in process Four classes remaining
(v) Increase the quality of admitted students through programs, recruitment and admissions.	Bramley, Parke*, Honeman, Deans	Finalize membership & operating principles of Enrollment Management Council	December 1, 2003	Finalized committee membership Hired consultant for summer 2004 to conduct an assessment of current practices
		Circulate for comment "Vision 2005 PLUS"	Fall 2003	Completed and implemented Fall 2003
		Press implementation of Royall contract to expand inquiry base	Ongoing through FY 05 admissions cycle	Completed and implemented Fall 2004 including the use of the "Fast Application" program
		Review and revise all admissions activities and events, both on and off campus	Ongoing through next two recruiting cycles	Process ongoing Consultant hired for Summer 2004
		Implement pilot "Fast Application" program	December, 2003	Process implemented in Fall 2003 for Fall 2004 first-year class
		Revise enrollment management plan to enhance yield of high end students and identify areas for enrollment growth	Academic year FY04 for FY05 first year class	Significant modification to FA packaging made Fall 2003 to increase UVM attractiveness to Ace 7-9 applicants
		Redesign financial aid policies for implementation in FY 05	Academic year FY04 for FY05 first year class	Financial Aid policies redesigned and currently being utilized for FY 05

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IV. Recruit and retain excellent students, faculty and staff. - Continued

Action Steps	Champions	Milestones	Target Dates	Outcomes
(vi) Substantially expand merit and need-based financial aid endowments and gifts for the undergraduate and graduate population.	Bramley, Parke, deGroot*, Deans, Gower	Raise \$450,000 in current operating and \$2,000,000 in new endowment gifts for student financial aid. The long term goal to be reached by FY07 is a total of \$2,000,000 per year for financial aid through both annual gifts and increased endowment income.	June 2004 for FY04 targets	Raised \$4,233,111 in current operating and \$2,020,134 in new endowment gifts through March 2004. Current operation total includes \$3.2M from Freeman Foundation.
(vii) Thoroughly analyze and reform as appropriate financial aid protocols in order to maximize efficiency in resource allocation as measured by outcomes	Bramley*, Gower, Parke	Complete analysis of current allocation and review against strategic criteria	January 1, 2004	<p>Changes made to merit aid to more closely align with academic performance and ACE ranking</p> <p>Report presented to the Academic and Student Programs Committee of the Board of Trustees in November 2003</p> <p>Continued analysis underway with update provided to the Academic and Student Programs Committee of the Board of Trustees in May 2004</p> <p>Changes to policies related to portability of UVM financial for students studying abroad implemented January 2004</p>
		Review broader pricing strategy issues	April 1, 2004	<p>Continuing process of reviewing price structure</p> <p>Central part of the feasibility study</p>

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V. Strengthen and focus academic programs, emphasizing liberal education, health and the environment

Action Steps	Champions	Milestones	Target Dates	Outcomes
(i) Implement a university-wide honors college emphasizing cross-disciplinary and interdisciplinary linkages.	Bramley, Parke, Taylor*, Honors Council, Faculty Senate (curriculum. and programming)	Call for Fall 2004 course proposals and selection of course (Fall 2003), develop policies for selection of admitted students for Fall 2004 (Spring 2004)	Full implementation Fall 2004	First-Year course selected and developed (including related faculty seminar) Call for Sophomore Seminar Proposals sent in April 2004 for Fall/Spring 2005/2006 First class recruited and selected Program being developed
	Gustafson, Ballard* (facilities, including residential college in new residence halls)	Identify temporary location for administrative offices	Summer 2003	Offices temporarily located in Allen House
		Identify location of residential component and determine site for permanent administrative offices	July, 2004	North wing of the new Residence Hall Complex has been identified as the permanent location occupying in August 2005
(ii) Through faculty processes, create greater cohesion of the undergraduate curriculum.	Bramley, Parke*, Faculty Senate	Encourage Faculty Senate curriculum comm. to create sub-committee. to revisit the Committee on Baccalaureate Education (COBE) report and related analyses of the value and importance of a common core curriculum as a first-year experience	Fall 2003; Ongoing until successful	No Progress
		Press First Year Experience Committee to examine national research on the question of curricular cohesiveness and its relationship to retention and successful graduation rates	FY 2004, Report to Vice President for Undergraduate Education by May 1, 2004	No Progress
(iii) evaluate international education and programs.	Bramley, Gates*, Youngblood, Carr, Parke	Develop plan to refine and expand international programs and curricular offerings	February 1, 2004	Progress made in focusing the range of opportunities identifying programs that match UVM mission and direct affiliations including targeting of financial aid
(iv) Strengthen the Academic Program Review process, emphasizing action-oriented outcomes including consolidation/elimination of programs as appropriate.	Bramley*, Youngblood, Faculty Senate	Complete Memorandum of Understanding for all reviewed programs	December 1, 2003	Eight meetings were held to complete the Academic Program Review Process Three MOUs signed with several in the process of being completed
		Discuss with Faculty Senate external review visit process being adopted	December 1, 2003	Met with Faculty Senate to discuss ways of strengthening the Academic Program Review Process which included great use of an external review team

Matrix for Advancing UVM for FY '04

VI. Strengthen financial resources

Action Steps	Champions	Milestones	Target Dates	Outcomes	
(i) Expand fiscal resources consistent with the university mission.	Fogel, Bramley, Gower*	Develop target plans for additional revenue sources; complete assessments of administrative operations	December, 2003	Preliminary reviews of administrative operations are complete; more detailed review of operations, processes, income-expense activities, and other additional revenue sources will continue in FY05	
(ii) Perform rigorous and ongoing comparisons of our academic, financial, and operational performance against a carefully selected and consistent set of peer and aspirant institutions.	Fogel, Bramley*, Gower, VPs, Deans	Annual update of peer and aspirant data	Fall 2003	Continuing as we develop benchmarks for financial and operational performance	
		Review next set of Delaware Data	Fall 2003	Current data received summer 2003, analysis currently underway	
(iii) Re-engineer administrative and bureaucratic policies and processes to eliminate waste and duplication	Gower* (finance and business processes, including, with McDonald)	Replace administrative information systems	Finalist determined in April 2004, Approval May 2004, Implement October 2004 - January 2006	Administrative Systems Replacement Project is on target; proposal going to the Board of Trustees in May 2004 for approval	
		Begin to implement technology-based services improvement project with plans developed for each division of Finance and Administration with specific timelines.	December 1, 2003 and ongoing	CIT working with administrative units to enhance financial management process	
	Gustafson* (student services)	Assess and streamline administrative appeals process	April 1, 2004	Process revised and changes implemented	
		Assess technology needs of the division with particular attention to website management and report recommendations to the Vice President	April 1, 2004	Revised deadline June 2004 - Web Analysis consultant examining processes	
	Parke* (academic support units)	Create an Integrated Student Services Center in Waterman and cross train staff from student accounting, registrar, financial aid, and telecommunications	(1) 12/1/03 complete construction of student service counter; SP '04 complete cross training of multi functioning staff; 9/04 finalize integration of service; on-going, engage in continuous process improvement of this integrated student services center to potentially incorporate other related student services as appropriate		Student Service Center opened February 2003
			Finalize shift of residency officer from Admissions to Registrar	January 1, 2004	Position shifted to Registrar's Office effective January 2004

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		Initiate a comprehensive review of all current practices in admissions with eye toward gaining efficiencies from out sourcing etc.	May 1, 2004	Process ongoing
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VI. Strengthen financial resources - Continued

Action Steps	Champions	Milestones	Target Dates	Outcomes
(iv) Explore and implement as appropriate more cost-effect sourcing, including co-generation of electricity, sole-source vendor relationships, e-purchasing, etc.	Gower, Evans, Ballard*, Martin	Investigate potential sole sourcing opportunities by identifying three most beneficial opportunities	October 1, 2003	Five sole sourcing opportunities have been identified and one implemented in effective January 1, 2004
		Obtain approval from administration to pursue sole source commodities agreements	October 15, 2003	Approval was requested on a rolling basis First approval granted on January 1, 2004
		Issue RFP's and award contracts	June 30, 2004	An office supplies contract was awarded to Boise Cascade effective January 1, 2004
		Implement e-procurement opportunities	January 1, 2004	To begin after ERP vendor chosen summer of 2004
(v) Successfully implement the comprehensive campaign.	Fogel, deGroot*, Bramley, Deans	Successfully launch and implement the first year of the public phase of The Campaign for The University of Vermont	Vermont launch October 2003	Campaign Launched October 3, 2003 at Shelburne Farms. 654 attended.
		Sponsor Regional campaign launches	New York and Boston Spring 2004	Boston Launch scheduled for May 5, 2004. New York Launch postponed to FY05.
		Seek to add \$55.5 million to total booked for the Campaign for the University of Vermont bringing campaign commitments to \$155,500,000 -- a 50% increase in commitments from FY03 to FY04.	June 30, 2004	\$50,529,106 added to total booked for The Campaign for The University of Vermont in FY04 to-date. Campaign total at \$150,628,384 with 3 months left to meet target.
(vi) Begin to shift development costs from general fund to self-funding mechanisms	Gower, deGroot*, Fogel	Approve endowment fee by the Board of Trustees	September 12, 2003	September 13, 2003 the Board of Trustees approved a 0.5 percent fee applied to the University endowment to cover reasonable costs associated with endowment management and operation
		Build FY 2005 budget including endowment fee	May 1, 2004	Under development, completion scheduled for May 15, 2004
		Develop funding measures for expansion and support of alumni and development programs, gradually shifting the source from the general fund to self-funding mechanism	Ongoing	Ideas such as service charges and alumni association membership fee under consideration. Due diligence on membership fee to be completed by May 2004

Matrix for Advancing UVM for FY '04

VI. Strengthen financial resources - Continued

Action Steps	Champions	Milestones	Target Dates	Outcomes
(vii) Aggressively pursue development and exploitation of University intellectual property through the research enterprise and public/private partnerships, including taking equity positions in spin-off companies	Bramley, Carr*, Evans, Gower, Hale, Deans, Faculty	Advance policies for intellectual property and start-up ventures	May 1, 2004	IP Policy has been revised and is currently under review Policy/procedures for use of facilities and equipment drafted
		Establish innovation award to support entrepreneurial faculty	May 1, 2004	Under consideration
		Support development of new start-up companies through technology incubator and associated training	Ongoing	Vermont Center for Emerging Technologies established March 2004 Vermont Innovation Alliance for Technology and Entrepreneurship launched February 2004
(viii) Pursue enhanced public support (state and federal) aligned with institutional priorities and develop and implement a strategy to attain desired outcomes in responding to legislative initiatives.	Meyer*, Bramley, Fogel	Identify, in coordination with deans and vice presidents state legislative initiatives and pursue maximum state base and supplemental appropriation and capital financing in partnership with Governor, CHEF	November 1, 2003	Based on information solicited - developed comprehensive request to submit to the legislature for consideration Advocate University requests with CHEF and coordinate our joint requests
		Obtain Board approval of requests for increased base state appropriation, appropriate supplemental requests, and state capital requests	November, 2003	3% base increase One million supplemental Three million Capital Construction
		Obtain increased state capital financing for facilities and joint state/University projects	June 1, 2004	Legislature is still in session - anticipate final allocation late May 2004
		Achieve maximum federal funding from FY 2004 federal priorities	January 1, 2004	\$7.9 million awarded (% increase)
		Assemble federal Legislative requests and comments from deans and implement FY 2005 federal funding prioritization and submission	December 2003 and ongoing	Submitted prioritized requests January 2004
		Prepare and submit state and federal legislative requests, testimony on University issues	January 2004 and ongoing	Completed based on requests received

Matrix for Advancing UVM for FY '04

VI. Strengthen financial resources - Continued

Action Steps	Champions	Milestones	Target Dates	Outcomes
(ix) Develop budget and resource allocation models that are strategic and reward progress towards established goals and priorities.	Bramley*, Gower	Design a resource model for academic units based upon Student Credit Hour and number of majors, strategic and one-time components, new budget review process	Obtain software for developing new budget and capital models - November 1, 2003. Implement for FY05 for academic units	Budget review process implemented Strategic resource allocation process under review
		Design a strategic and sustainable budget model for information technology expenditures and investments as part of the IT Master Planning process	Complete by May 1, 2004 based on results of IT strategic planning effort and administrative system renewal project	Revised completion date November 2004

Matrix for Advancing UVM for FY '04

VII. Strengthen research, scholarship and the creative arts

Action Steps	Champions	Milestones	Target Dates	Outcomes
(i) Allocate resources and revise policies as appropriate to maximize research productivity and administrative and facilities cost recovery	Bramley, Gower, Carr*, Bazluke	Develop center(s) of excellence strategy to leverage targets of opportunity and academic programs	May 1, 2004	Proposal drafted
		Support strategic planning for research facilities expansion/renovation	May 1, 2004	Ongoing
(ii) Expand graduate student enrollments emphasizing Ph.D. programs, interdisciplinary study, and the priority themes of the strategic plan.	Bramley, Carr*, Deans, Faculty	Develop a strategy for implementing targeted interdisciplinary graduate programs	January 1, 2004	Strategy developed and currently being implemented
		Enhance marketing strategy for graduate programs	May 1, 2004	Ongoing
(iii) Create a collaborative environment that supports and rewards faculty achievement in teaching, research/scholarship, and service.	Bramley, Carr, Youngblood*, Gower, Deans, Chairs	Establish formal recognition mechanisms (e.g. , an annual reception) to honor the numerous external professional awards faculty receive for their scholarship	May 1, 2004	Delayed until FY 05
(iv) Identify and implement steps to support the development of cross-disciplinary and interdisciplinary research and scholarship.	Bramley, Carr*, Parke, Youngblood, Deans, Faculty Senate	Identify resources to expand cross-disciplinary graduate programs (e.g. Material sciences, Computer Sciences, neurosciences)	January 1, 2004	Ongoing and contained in PWC Feasibility Study
		Review structure and management of cross and interdisciplinary graduate programs	May 1, 2004	Current and proposed structures are under review
(v) Make appropriate and focused investments in the infrastructure and technology supporting our research mission.	Bramley, Gower, Carr, Saule*	Survey technology and network needs of faculty and researchers	March, 2004	In process as part of IT master planning - anticipated completion May 2004
		Asses network infrastructure in support of research, particularly to optimize Internet2 (high bandwidth) use	March, 2004	Process ongoing
(vi) Create internal incentives to increase substantially the external funds supporting graduate education.	Fogel, Bramley, Carr*, deGroot	Review/revise policies and procedures to encourage external support of graduate students	May 1, 2004	Two policies in place - tuition scholarship for research credits and revised graduate financial support
(vii) Increase the competitiveness of graduate student support.	Bramley, Carr*, Deans	Revise stipend allocations based upon competitive fields of study	May 1, 2004	First phase of stipend increases implemented Partial health care coverage for graduate students implemented Pilot program for tuition scholarships launched
(viii) Recognize and respect the development of scholarship and curriculum within all disciplines that broadens knowledge about the diversity of the human experience.	Bramley, Deans, Coleman*	Sponsor workshop with Department Chairs about diversity and scholarship in the RPT process	May 1, 2004	Delayed until Fall 2004
		Encourage Faculty Senate to expand University curricular opportunities and requirements with respect to diversity in the curriculum	May 1, 2004	President's Task Force on Racial Diversity subcommittee on curriculum is preparing a list of suggestions for additional diversity requirements in the curriculum - Process ongoing

Matrix for Advancing UVM for FY '04

VIII. Effectively communicate and promote institutional priorities with internal and external stakeholders including the State of Vermont.

Action Steps	Champions	Milestones	Target Dates	Outcomes
(i) Develop vision, mission, and goals for Vermont's higher education compact	Fogel, Meyer*	Draft vision and goals for Commission on Higher Education Funding (CHEF) consideration	October 1, 2003	Vision and goals for the Commission on Higher Education Funding approved
		Final CHEF submission of vision and goals to legislature	November 1, 2003	Commission on Higher Education Funding vision and goals submitted to legislature
(ii) Develop and implement strategies to improve the visibility of the University throughout the academy nationwide and in the national media	Fogel, Bramley, Gustafson, Corredera* (Wakefield), Carr, Meyer	Engage with national associations	Ongoing	Ongoing
		Establish a national voice on major higher education issues	Ongoing	President Fogel interviews: New York Times, National Public Radio (twice), and public television
		Host national meetings in disciplines	Ongoing	Society of Environmental Journalist scheduled for October 2006
		President to visit a series of reporters, editors at national media outlets and higher education trade journals	Ongoing	Ongoing - recent visits to Boston Globe; other media planned for summer 2004
		Develop a series of Op-Ed pieces to be placed in national media on key higher education issues	One per quarter	One placement (Chicago Tribune) to-date Process ongoing to identify opportunities where news and events align with UVM strengths and interests
		Strategic visits throughout Vermont to emerging civic, political, and community leaders	Summer 2003	Fourteen successful events executed throughout Vermont
		Meet with Vermont editorial outlets	Ongoing	All major media outlets scheduled with positive editorials resulting
		Develop Regular communication with state legislature and executive branch	December 2003 and ongoing	Bi-weekly "What's New" published and distributed to legislators and Vermont Leaders
(iii) Develop an operating plan to increase effective communication with the Board and achieve complete transparency, improve timeliness and ultimately the quality of decisions	Fogel*	Create one-page monthly Board letter on strategic items only	Ongoing	Five letters were sent to the Board updating on University activities
		Make regular phone calls to Board chair and periodic check-ins with other trustees	Ongoing	System established to assure regular phone contact with Board Chair and periodic check-ins with other members

Matrix for Advancing UVM for FY '04

VIII. Effectively communicate and promote institutional priorities with internal and external stakeholders including the State of Vermont. - Continued

Action Steps	Champions	Milestones	Target Dates	Outcomes
(iv) Ensure that the analyses driving strategic change are effectively communicated to, and discussed with, faculty, and that faculty have an appropriate and meaningful role in setting direction, shaping policy, and determining the nature and pace of change. Ensure that faculty have a role in shaping - and feel that the institution is fully committed to - the creation of an environment that supports faculty achievement in teaching, research, scholarship, creative activity, and service at the highest national levels.	Fogel, Bramley*, Deans, Faculty Senate Leadership	Develop Strategic Planning webpage to post unit/department plans	December 1, 2003	Strategic Planning website on the Provost web page Decided to delay posting unit/departmental plans on website until fall 2004 to further refine the process
		Replace faculty member on University Planning Council	December 1, 2003	Membership of the UPC remained the same believing that consistency of representation was important
		Routinely distribute performance matrices	Ongoing	Academic Unit Performance matrices routinely updated and distributed to unit heads Performance matrices posted on the Office of Institutional Studies web page accessible by password
(v) Improve communication with alumni through print and electronic media (web-based programs, email, etc.) as well as through direct personal contact	deGroot*, Gustafson, Corredera	On-line community fully functional and messages "pushed"	March 1, 2004	Fully functioning March 1, 2004. 29,099 e-mail addresses now active -- a 76% increase since July 1st. Data collected for Harris Alumni Directory will increase these numbers by end of FY04. Good example of "pushed" message was offer of Men's Basketball Championship Tickets for on-line community registration. Over 300 people registered in this drive. Currently have 20,000 people registered to receive Dateline UVM.
		Campaign website launched	October 31, 2003	Launched October 1, 2003
		Gift report posted on the web	October 1, 2003	Posted December 1, 2003
		University Case Statement printed	October 1, 2003	Printed by October 26, 2003

Matrix for Advancing UVM for FY '04

VIII. Effectively communicate and promote institutional priorities with internal and external stakeholders including the State of Vermont. - Continued

Action Steps	Champions	Milestones	Target Dates	Outcomes
(v) Improve communication with alumni through print and electronic media (web-based programs, email, etc..) as well as through direct personal contact - Continued	deGroot*, Gustafson, Corredera - Continued	School/College Case Statements printed	June 30, 2004	A&S, CNHS , RSENR, BSAD, case statements on track for June 30, 2004. COM & E&M will not be complete by June 30, 2004 due to major shifts in case. CALS & CESS not doing traditional case in lieu of higher-quality newsletters that would present case.
		Combined Annual Financial Report and Gift Report printed	October 31, 2003	Completed January 16, 2004. Delayed due to complexity of data review. This report will be eliminated in FY05 due to budget reduction.
		Register 10,000 alumni, parents and friends for UVM events on and off campus	June 1, 2004	9,381 registered for events to-date.
		Increase number of one-on-one visits with volunteers and prospects to 1,900 (20% increase)	June 30, 2004	1,345 one-on-one visits through April 22, 2004. This target will be challenge to meet. A major push will happen in last quarter; however, longer than expected staff vacancies reduced number of one-on-one visits.
		Promote the new "UVM Connections" online community as a primary vehicle for interaction between the University and its alumni	Monthly through Dateline UVM, quarterly through the Vermont Quarterly	Promoted in 3 Vermont Quarterly's, through postcard mailing and 3 broadcast e-mails to alumni & parents. 4,460 registered users which exceeded the target of 3,200.
		Continue support for expanded coverage in Vermont Quarterly of news and feature placements of interest to alumni and supportive of the Comprehensive Campaign	Quarterly	Campaign featured in Fall and Winter issues. Spring issue carried Campaign section -- ongoing through 2007.
		Engage alumni, parents, and friends in ways that build lifelong relationships with the University	Measurement ongoing; evaluate monthly	Measurements for this goal are being developed.