ONU

OHIO NORTHERN UNIVERSITY

STRONGER TOGETHER:

2023-2029

OHIO NORTHERN UNIVERSITY • POLAR BEARS

A Strategic Plan for Ohio Northern University

COVER LETTER

A strategic plan is often compared to a "north star," a talisman that guides seekers on their journey forward. It is a particularly apt metaphor for Ohio Northern University and the Polar Bear community.

Our path forward is inspired by where we have been. For more than 150 years ONU has shaped some of the brightest scholars, scientists, philanthropists, businesspeople, health care professionals, and performers. In this strategic plan, we set a course to maintain ONU's impact for generations to come.

And, our path is shaped by who we are. Together, we are a community dedicated to outstanding academics, the far-reaching Polar Bear community, our home base in pastoral Ada, Ohio, and an enduring commitment to a better future. That is why *Stronger Together*, the strategic plan that will guide ONU for the next five years, was shaped by all of us, working together to envision a bold future focused on four strategic drivers: **people, teaching and learning, place,** and **sustainability.**

Together, we will seize momentum through innovation. Together, we will call on our collective strength to navigate headwinds facing America's colleges and universities. Through our strategic plan and an ensuing plan for Belonging, Inclusion, and Diversity, we will collectively embody our motto: Ex diversitate vires, or, out of diversity, strength.

The FY 2023-2029 strategic plan reflects ONU's strengths and foundational programs. Our vision includes a campus community that meets health and wellness needs of students, faculty, and staff, built upon the traditional strength of our health sciences programs, and centered in a reimagined King-Horn Sports Center. We envision outstanding faculty and staff—including underrepresented and BIPOC employees—recruited, retained, and supported through thoughtful investments in compensation, benefits, professional development, technology, and infrastructure. We will explore alternate learning models and degree pathways to equip all students to succeed in their careers and meet the region's growing workforce needs.

An ongoing commitment to continuous innovation and improvement will carry ONU forward. Prudent financial management, effective branding and marketing, and intentional collaboration will ensure ONU's value to the state, region, and nation's future. We will move forth with confidence, integrity, awareness, and a surefire commitment to the understanding that we are *stronger together*. Please join us on this journey.

Sincerely,

Melissa J. Baumann, Ph.D.
President

Pamela S. Hershberger,
Board Chair

Dr. Richard P. Keyes,
Board Vice Chair

> Ohio Northern University's mission is to provide a high-quality learning environment that prepares students for success in their careers; service to their communities, the nation, and the world; and a lifetime of personal growth...
>
> Excerpt from the Ohio Northern University Mission Statement

EXECUTIVE SUMMARY

ONU will be a welcoming and supportive community where faculty, staff, and students feel a sense of belonging and where we come together to build a strong foundation for a successful future while ensuring the long-term financial sustainability of the institution.

PILLAR 1: PEOPLE

Declaration: At Ohio Northern University, students are prepared for success in their careers and life; faculty and staff have the support to fully achieve their vocational goals; alumni, employers, and stakeholders are enriched through their connections to ONU; and we share a sense of belonging, inclusion, and diversity.

Objective 1: ONU will retain and graduate students by supporting their academic, professional, financial, and wellness needs, thereby creating a strong sense of belonging.

Objective 2: ONU will support its faculty and staff, creating a strong culture of engagement and belonging.

Objective 3: ONU will proactively engage alumni, stakeholders, and employers, particularly those in the surrounding region, and will build strong relationships in support of the long-term success of ONU.

Significant Outcomes: Develop a strategic plan and tactics to achieve first-year retention and six-year graduation goals, building the plan on strategies directed at student engagement, wellness, finances, and academic support.

Institute a schedule of benchmarking for employee benefits and surveys of campus culture to support a positive culture of belonging at ONU.

Establish goals for categories of diversity and underrepresented students, faculty, and staff and work with the Chief Belonging, Inclusion, and Diversity Officer to build a plan.

Establish strategies that enhance the affordability and value students experience while attending ONU.

PILLAR 2: TEACHING AND LEARNING

Declaration: Ohio Northern University will be known for distinctive academic programs delivered by accomplished faculty that equip all students to succeed in their careers and meet the region's growing workforce needs.

Objective 1: ONU will support high-quality, accessible, and diverse learning environments for students, faculty, and staff.

Objective 2: ONU will remain at the leading edge of curricular design, implementation, and evaluation to enhance learning and meet the needs of a diverse student body.

Objective 3: ONU will work proactively to align and meet the needs of employers through a 21st-century focus on its foundational programs.

Significant Outcomes: Develop a program review process to optimize academic program resources while aligning programs to workforce needs.

Increase degree pathways for traditional, non-traditional, a nd transfer students, including hybrid and online instructional offerings.

PILLAR 3: PLACE

Declaration: ONU's campus will meet the learning and recreational needs of students, faculty, and staff, as well as the living accommodations of our students.

Objective 1: The University will develop a campus master plan that meets the campus academic, residential, recreational, and athletics needs.

Objective 2: ONU's recreational and wellness facilities will meet the needs of the campus community and build upon our foundational excellence in the health sciences.

Objective 3: ONU will invest in technology to meet the current and future needs of students, faculty, and staff.

Significant Outcomes: Envision, plan and fundraise for a renovated and expanded King Horn Center in conjunction with a Health Sciences facility.

Review current technology capabilities and align investments to deliver and support faculty, staff, and students.

PILLAR 4: SUSTAINABILITY

Declaration: Ohio Northern University will be financially stable by fostering a culture of continuous innovation and improvement through prudent management, effective branding and marketing, cost management, and enduring relationships.

Objective 1: ONU will balance expenditures with available resources, increasing the University's Financial Indicators Tool (FIT) score to be in the 4 to 5 range or higher.

Objective 2: ONU will meaningfully increase and diversify enrollment, clearly communicating its brand to all stakeholders.

Objective 3: ONU will outperform investment benchmarks and increase earned income and contributed revenue.

Significant Outcomes: Achieve a five-year FIT score average above 4.0 by 2027-28 fiscal year.

Meet or exceed investment benchmarks in two out of three asset classifications on a 3-5 year average annually.

Significantly increase the endowment to eliminate the structural deficit and support the quality of the institution.

STRATEGIC DRIVERS

Several factors are impacting the higher education landscape. These factors—referred to as *strategic drivers*—were top of mind while we planned for Ohio Northern University's future.

- The United States will face a **reduced population of traditional-age college students** (sometimes referred to as the *demographic cliff*) in the next five years due to a decrease in births during the Great Recession. This means that institutions of higher education will be competing over a shrinking pool of students.

- In addition, colleges and universities face **increasing competition from other forms of learning**—including online education, certificate programs, and technical schools. Students are often looking for quicker, more cost-effective ways to move their careers forward and find ways to achieve that outside of attending a four-year, residential institution.

- The declining number of traditional-age college students will also lead to **financial challenges** for private institutions like Ohio Northern University. Decreases in enrollment result in less revenue to support the critical expenses that keep an institution open.

- The cost of higher education is growing at a rate that outpaces families' ability to pay for it. This makes **affordability** a key issue for attracting and retaining students.

- The growing diversity of the US population, an increase in immigration, and rising college attendance among minority communities will result in significant **demographic shifts** in higher education. College students of the next five to ten years will have cultural backgrounds significantly different than those of today. Universities and colleges will need to adapt to successfully recruit, retain, and support these students. These students will be critical to an institution's ability to thrive rather than survive through the demographic cliff.

- Institutions of higher education will also need to adjust to **the changing needs of employers**—both locally and nationally. As technology changes, industries grow and contract, and generations of workers retire, academic programs will need to shift to respond to areas of opportunity.

- Finally, **attracting and retaining high-quality faculty and staff** will continue to be critical to the success of colleges and universities. The relationships faculty and staff develop with students—in the classroom, through mentorships and advising, and in faculty-led projects and research—help institutions like Ohio Northern University deliver exceptional learning experiences and create lasting connections with students and alumni.

PILLAR: PEOPLE

Declaration: At Ohio Northern University, students are prepared for success in their careers and life; faculty and staff have the support to fully achieve their vocational goals; alumni, employers, and stakeholders are enriched through their connections to ONU; and we share a sense of belonging, inclusion, and diversity.

Objective 1: ONU will retain and graduate students by supporting their academic, professional, financial, and wellness needs, thereby creating a strong sense of belonging.

Measures and Tactics of Success:

1. Student retention

- **a.** Overall retention rate
  - i. Appoint an advisory committee to support the Director of Student Success
- **b.** First-year retention:
  - i. Provide academic tutoring to students of need
  - ii. Expand peer mentoring to all colleges
  - iii. Ensure adequate counseling/mental wellness resources
  - iv. Expand first-year career services to develop student career paths and plans that lead to internships, jobs, graduate school placement, and highly selective volunteer opportunities
  - v. Increase support for historically marginalized program populations
- **c.** Underrepresented and BIPOC student retention
  - i. Intentionally recruit more underrepresented and BIPOC students
  - ii. Intentionally connect them to the multicultural office, scholarship opportunities, and BIPOC student organizations
  - iii. Create a Belonging, Inclusion, Diversity Strategic Plan
- **d.** Average student debt load
  - i. Increase the number of student scholarships awarded
  - ii. Increase the number of work study positions

2. Six-year undergraduate graduation rates

- **a.** Correlate year-to-year retention rates to expected six-year undergraduate graduation rates

3. Placement rate

- **a.** Connect all students to the Polar Career Center in their first year
- **b.** Connect alumni and students to the Center for Corporate Engagement

4. Students' wellness and belonging

- **a.** Measure and improve student well-being data, including:
  - i. Title IX
  - ii. Clery Act Report (crime, violence, etc.)
  - iii. National Survey of Student Engagement (NSSE)
  - iv. Collin's Law Report
- **b.** Collect and assess student belonging data, including:
  - i. Number of clubs, organizations, and events at ONU
  - ii. National Survey of Student Engagement (NSSE)
  - iii. Student organization participation (tools currently include EdSights chatbot and Northern Network)

PILLAR: PEOPLE (CONTINUED)

Declaration: At Ohio Northern University, students are prepared for success in their careers and life; faculty and staff have the support to fully achieve their vocational goals; alumni, employers, and stakeholders are enriched through their connections to ONU; and we share a sense of belonging, inclusion, and diversity.

Objective 2: ONU will support its faculty and staff, creating a strong culture of engagement and belonging.

Measures and Tactics of Success:

1. Faculty and staff retention

a. Increase overall retention of faculty and staff who best contribute to the institution's success, including retention of underrepresented and BIPOC employees

i. Offer competitive employment salary

ii. Offer competitive benefits

b. Align goals and objectives of staff within and across units to this strategic plan, with a focus on the educational mission of ONU

2. Faculty and staff job satisfaction and sense of belonging

a. Enhance campus climate and measure employee satisfaction

b. Enhance Belonging, Inclusion, Diversity (BID strategic plan)

c. Support faculty and staff affinity groups

3. Availability and utilization of professional development resources for faculty and staff

a. Encourage participation in professional, industry, and academic networks

b. Encourage equitable participation in the Center for the Advancement of Faculty Excellence (CAFE)

c. Encourage equitable participation in the Center for Corporate Engagement

d. Recognize faculty and staff excellence

e. Align corporate partner needs (consulting, special projects, etc.) with faculty expertise and opportunities

4. Faculty and staff recruitment

a. Job offer acceptance rate

b. Number of underrepresented and BIPOC candidates for each posted position

c. Number of successful and failed searches

d. Improve assistance for trailing partner employment

Objective 3: ONU will proactively engage alumni, stakeholders, and employers, particularly those in the surrounding region, and will build strong relationships in support of the long-term success of ONU.

Measures and Tactics of Success:

1. Employers recruiting ONU graduates

a. Increase the number of employers participating at job and internship fairs

b. Increase the number of alumni recruiting students

c. Collaborate and align long-term employer partner's employee goals, challenges, opportunities (BIPOC, female, retention, competencies, etc.) with ONU's goal to create mutual success

d. Establish proactive employer scholarships to build a stream of potential employees

2. Healthy and robust donor pipeline

a. Expand ONU's lead annual giving program

b. Expand affinity programs to engage underrepresented, BIPOC, and international alumni

3. Relationships with ONU

a. Expand the Center for Corporate Engagement programming and partnerships

Significant Outcomes:

Develop a strategic plan and tactics to achieve first-year retention and six-year graduation goals, building the plan on strategies directed at student engagement, wellness, finances, and academic support.

Institute a schedule of benchmarking for employee benefits and surveys of campus culture to support a positive culture of belonging at ONU.

Establish goals for categories of diversity and underrepresented students, faculty, and staff and work with the Chief Belonging, Inclusion, and Diversity Officer to build a plan.

Establish strategies that enhance the affordability and value students experience while attending ONU.

PILLAR: TEACHING AND LEARNING

Declaration: Ohio Northern University will be known for distinctive academic programs delivered by accomplished faculty that equip all students to succeed in their careers and meet the region's growing workforce needs.

Objective 1: ONU will support high-quality, accessible, and diverse learning environments for students, faculty, and staff.

Measures and Tactics of Success:

1. Experiential learning

a. Create a centralized process to track experiential learning

i. Number of students engaged in internships

ii. Number of students engaged in summer research

iii. Number of students engaged in Teaching Assistant/ Research Assistant experiences

iv. Number of students who are authors/artists in scholarly/creative articles/works

b. Determine the appropriate number of experiential learning experiences as it relates to retention in each academic program

2. Quality and diverse learning experiences

a. Develop degree pathways for traditional, transfer, and non-traditional students

b. Number of student professional organizations and off-campus invited guests presenting to students

i. All academic programs will invite relevant practitioners to campus to share their practice/ research with students

ii. All academic programs will demonstrate regular interaction with the relevant practitioners for students and faculty

c. Monitor and encourage high-impact practices in academic programs

3. Co-curricular assessment data related to diverse and high-quality programming

a. Develop an assessment process for co-curricular programming, involving the Colleges, Student Affairs Office, and the student organizations

b. Utilize the University Assessment Committee annual review process to foster continual improvement goals

4. Professional development experiences

a. Improve the quality and depth of faculty artistic works and scholarly research

i. Number of faculty who present at conferences

ii. Number of faculty citations in academic journals

iii. Number of earned hours faculty/staff spend on professional development via workshops or seminars

iv. Number of publications or performances of creative works

b. Involve students in research and publications

i. Number of students who participate in conferences with a faculty mentor

ii. Number of students who participate in competitions in their field of study

5. Program accreditation

a. When the cost-benefit analysis is positive, attain or maintain program accreditation to drive continuous program quality improvement

b. When the cost-benefit analysis is prohibitive or unavailable, engage in periodic peer-led external review

c. Ensure programs are aligned with or at the leading edge of curricular developments in the field

PILLAR: TEACHING AND LEARNING (CONTINUED)

Declaration: Ohio Northern University will be known for distinctive academic programs delivered by accomplished faculty that equip all students to succeed in their careers and meet the region's growing workforce needs.

Objective 2: ONU will remain at the leading edge of curricular design, implementation, and evaluation to enhance learning and meet the needs of a diverse student body.

Measures and Tactics of Success:

1. **Availability and quality of hybrid and online instructional offerings**
   - **a.** Establish quality measures for all courses regardless of delivery mode
     - i. Establish review body to assess quality
     - ii. Ensure delivery meets student needs
     - iii. Develop online/hybrid experiences that provide comparable quality to classroom experiences, particularly for science labs
     - iv. Conduct student evaluations around program effectiveness
   - **b.** Expand the Center for the Advancement of Faculty Excellence
     - i. Align technology with teaching
     - ii. Evaluate the impact of instructional design
   - **c.** Schedule and implement courses to align with student need
     - i. Offer trailer and remediation courses in January-term and summer
     - ii. Track graduation rate changes correlated to the completion of trailer and remediation courses

2. **Pedagogical scholarly output**
   - **a.** Support attendance at conferences that are educational in focus
   - **b.** Increase the number of grants awarded to develop curriculum

PILLAR: TEACHING AND LEARNING (CONTINUED)

Declaration: Ohio Northern University will be known for distinctive academic programs delivered by accomplished faculty that equip all students to succeed in their careers and meet the region's growing workforce needs.

Objective 3: ONU will work proactively to align and meet the needs of employers through a 21st-century focus on its foundational programs

Measures and Tactics of Success:

1. Number of degrees awarded by program

a. Measure the three-year rolling average of the number of students per academic program

b. Measure faculty who contribute significantly to general education by student credit hours generated

c. Work with faculty to sunset under-enrolled programs that are not highlighted in the Bureau of Labor Statistics data for current future US jobs

d. Move faculty lines to over-enrolled programs

2. Market competitiveness of ONU programs in the context of workforce needs

a. Evolve current programs to meet the changing needs of employers

i. Assessment reports

ii. Employer participation at ONU career fairs

3. Academic program alignment with workforce trends

a. Align recruitment and retention with current and projected workforce needs

4. New programs meeting workforce needs

a. Expand footprint in health sciences

i. Identify existing faculty/staff in health sciences and increase collaboration across departments

ii. Build on strength in rural healthcare

iii. Establish and maintain relationships with surrounding health systems

iv. Invite a health system to establish an on-campus office or satellite location

b. Evaluate feasibility of advanced health science degrees (e.g., Physician Assistant program, Master of Science in Nursing, Doctor of Nurse Practitioner), leveraging existing Pharmacy and Nursing faculty expertise

5. University relationships with employers and graduate schools

a. Provide high-impact and custom Continuing Education programs in the Center for Corporate Engagement for employers

b. Maintain employer satisfaction and gather their feedback about the quality of education delivered to our students

c. Provide students with the soft skills that meet the needs of 21st century employers or graduate schools

Significant Outcomes:

Develop a program review process to optimize academic program resources while aligning programs to workforce needs.

Increase degree pathways for traditional, non-traditional, and transfer students, including hybrid and online instructional offerings.

PILLAR: PLACE

Declaration: ONU's campus will meet the learning and recreational needs of students, faculty, and staff, as well as the living accommodations of our students.

Objective 1: The University will develop a campus master plan that meets the campus academic, residential, recreational, and athletics needs.

Measures and Tactics of Success:

1. Refreshed ONU campus master plan

a. Retain an external architect and create an inventory of the existing campus facilities and grounds to include:

i. Quantitative score of each building with respect to overall needs to be addressed based on deferred maintenance costs, current utilization, age of structure, projected renovation costs and predicted future utilization

ii. Prioritization of building projects based on objective data obtained in (i)

b. Assess the age and quality of ONU facilities as compared to competitor universities

c. Include input from students, faculty, and staff around the current and future usage of facilities and grounds

d. Prioritize based on the needs outlined in this Strategic Plan

e. Review and finalize by the Board of Trustees to maximize student outcomes and campus operations

f. Disseminate the final plan to the campus community

2. Align resources with the cost, funding sources, and sustainability of buildings and programs

a. Provide annual updates to campus regarding the progress

b. Allocate depreciation within the budget

3. Meet the learning needs for ONU students, staff, and faculty

a. Assess classroom usage as part of the Campus Master Plan

b. Develop the Student Success Center facilities

i. Number of students accessing the facility

ii. Retention and graduation rates

c. Provide collaborative learning spaces for commuter students

i. Number of students using facilities

ii. Retention of commuter students

PILLAR: PLACE (CONTINUED)

Declaration: ONU's campus will meet the learning and recreational needs of students, faculty, and staff, as well as the living accommodations of our students.

Objective 2: ONU's recreational and wellness facilities will meet the needs of the campus community and build upon our foundational excellence in the health sciences.

Measures and Tactics of Success:

1. Updated athletic, recreation, and wellness space

a. Re-engineer King Horn to meet the needs of student athletes

i. Practice and locker room facilities

ii. Game day facilities

iii. Coaching staff offices

b. Expand King Horn to meet the recreation and wellness needs of students, faculty, and staff

i. Number of students participating in Rec Sports

ii. Number of students using the wellness facilities

iii. Number of Club activities held in King Horn

c. Develop next-generation health science-related classroom and lab learning spaces

i. Strength and Conditioning

ii. Exercise Physiology

iii. Interdisciplinary and exploratory academic programs connecting Pharmacy, Basic Sciences, Business, and Engineering

iv. Nursing and Public Health

v. Rural healthcare

Objective 3: ONU will invest in technology to meet the current and future needs of students, faculty, and staff.

Measures and Tactics of Success:

1. Efficient and effective online and hybrid learning and work environments

a. Increase the number of courses using ONU's learning management system, lecture capture/distribution, and collaborative tools such as Google Suite or Microsoft 365

b. Train and resource faculty to be successful in hybrid environments

c. Increase the number of high-tech classrooms to enhance classroom teaching

d. Provide more support/information/training about how to use existing technology

2. Information technology infrastructure

a. Ensure performance and reliability of fiber lines, wired network, and wireless network for all academic, administrative, and residential areas

b. Update legacy hardware and software, including ONU ID card usage, security systems, and physical infrastructure controls

3. ONU intranet portal

4. Electronic document storage system and workflow

Significant Outcomes:

Envision, plan and fundraise for a renovated and expanded King Horn Center in conjunction with a Health Sciences facility.

Review current technology capabilities and align investments to deliver and support faculty, staff, and students.

PILLAR: SUSTAINABILITY

Declaration: Ohio Northern University will be financially stable by fostering a culture of continuous innovation and improvement through prudent management, effective branding and marketing, cost management, and enduring relationships.

Objective 1: ONU will balance expenditures with available resources, increasing the University's Financial Indicators Tool (FIT) score to be in the 4 to 5 range or higher.

Measures and Tactics of Success:

1. FIT score on a rolling five-year average.

a. Increase Operating Reserve Ratio (resource sufficiency)

b. Reduce Debt to Expendable Equity Ratio (debt management)

c. Improve Change in Net Assets Ratio (asset performance)

d. Increase Operating Margin Ratio (operating results)

e. Update Long-Range Financial Plans annually to clarify the drivers of future FIT Score success, given the changing dynamics of our external environment

2. Enrollment management partnerships.

a. Evaluate and improve the admission funnel

i. ROI for the inquiry to application to accepted to deposited student funnel

ii. Benchmark competitor and aspirational competitors to optimize ONU's enrollment and financial aid model

b. Review the effectiveness of ONU's financial aid model annually

i. Number of financial aid appeals

ii. Number of student withdrawals for lack of financial support

iii. Track applicants who did not matriculate to ONU via the National Clearinghouse reports

PILLAR: SUSTAINABILITY (CONTINUED)

Declaration: Ohio Northern University will be financially stable by fostering a culture of continuous innovation and improvement through prudent management, effective branding and marketing, cost management, and enduring relationships.

Objective 2: ONU will meaningfully increase and diversify enrollment, clearly communicating its brand to all stakeholders.

Measures and Tactics of Success:

1. Enrollment and retention

a. Ensure that external messaging and recruitment reflects the institutional strengths in enrollment

b. Evaluate the potential market for non-traditional students in targeted academic programs

c. Build and direct resources for non-traditional students (i.e., scholarships, new types of student support services, etc.)

d. Consider acquisition opportunities for academic programs from struggling institutions

2. Number of schools and community-based organizations partnered with ONU

a. Increase the number of higher education partnerships, including matriculation agreements

b. Increase the number of students yielded per partnership, especially from targeted feeder schools and from underrepresented minority and BIPOC populations

c. Improve the geographic diversity within and external to the State of Ohio

d. Increase the number of ONU faculty, staff, and students from all colleges who engage with prospective students

3. Brand recognition and perceptions

a. Maintain brand integrity

b. Increase earned media stories in major Ohio media markets and neighboring states

c. Create and implement social media plans for each college/department/program

Objective 3: ONU will outperform investment benchmarks and increase earned income and contributed revenue.

Measures and Tactics of Success:

1. Endowment measures

a. Support increased endowment growth

i. Prudent investment growth

ii. New gifts and pledges to the endowment

iii. Endowment draws will not exceed the Board policy on spending rates to preserve intergenerational equity of the endowment

b. Track and improve ONU's endowment value (dollars per student)

c. Meet or exceed all other measures in the endowment investment policy

2. Earned revenue measures

a. Increase the number and value of corporate sponsorships

b. Increase sponsorships from nonprofits and/or other endowed private/family organizations

3. Contributed revenue measures

a. Develop continuing education program certificates for working professionals while elevating ONU's presence and brand

b. Increase the number of engagement and philanthropic opportunities for alumni and friends having shared interests and experiences

Significant Outcomes:

Achieve a five-year FIT score average above 4.0 by 2027-28 fiscal year.

Meet or exceed investment benchmarks in two out of three asset classifications on a 3-5 year average annually.

Significantly increase the endowment to eliminate the structural deficit and support the quality of the institution.

METHODOLOGY

The strategic planning process took place from July 2022 through February 2023. Ohio Northern University retained Benefactor Group as counselors and facilitators for the duration of the process, which is described in detail below.

At the beginning of the project, ONU established a committee – referred to as the Strategic Plan Core Group – to provide guidance, feedback, and oversight throughout the process. Core Group members included:

- Melissa J. Baumann, Ph.D., President;
- Dr. Rick Keyes, Vice Chair, ONU Board of Trustees and Chair, Long Range Issues and Strategic Partnerships (LRISP) Committee of the Board of Trustees;
- Jason Broge, Vice President for Financial Affairs;
- Dr. Juliet Hurtig, Provost & Vice President for Academic Affairs;
- Shannon Spencer, Vice President for University Advancement; and
- Dr. Adriane Thompson Bradshaw, Vice President for Student Affairs.
- Dr. Kelly Lawrie, Assistant Vice President for University Advancement, served as project manager.

DISCOVERY

The strategic planning process began in July 2022 with an orientation meeting with Core Group members to learn about the vision and affirm the objectives of the planning process. Soon thereafter, the project entered into the discovery phase. ONU provided Benefactor Group with a variety of documents, including fundraising and marketing materials, financial reports, policies, annual reports, program descriptions, and other relevant information. Benefactor Group conducted a review of literature pertaining to the higher education landscape, including *Redesigning the University* (Timothy S. Tracy, Richard J. Messina, and Serena K. Matsunaga) and *The Agile College* (Nathan D. Grawe).

The discovery process was rooted in Appreciative Inquiry, an organizational change model developed by David Cooperrider at Case Western Reserve University. The model is based on evidence that organizations change in the direction in which they inquire. This strengths-based approached allowed ONU to create a path forward that is built on the foundational and best aspects of the University today. More information about Appreciative Inquiry can be found here.

Benefactor Group provided guidance to ONU as they identified internal and external stakeholders to participate in information-gathering activities, including focus groups, World Café conversations, and surveys. The objectives of these discovery activities are listed below.

1. To understand current perceptions of Ohio Northern University.
2. To define stakeholders' visions for what ONU could look like in the future.
3. To build ownership of the planning process and resulting document through shared governance.
4. To gauge responses to the various challenges facing higher education in general and Ohio Northern University, specifically.

The discovery phase was shaped by ONU's enduring mission, vision, and core values, including collaboration, community, diversity, excellence, faith, integrity, and service. In addition, the ONU personality type (developed by Carnegie) informed all stages of the strategic plan. The three archetypes outlined as central to the ONU personality are described below.

- The welcoming mentor. Defining traits: supporting and selfless. The welcoming mentor values altruism, commitment, and generosity.
- The experiential trailblazer. Defining traits: adventurous and inquisitive. The experiential trailblazer values investigation, curiosity, and trailblazing.
- The creative innovator. Defining traits: brilliant and imaginative. The creative innovator values experimentation, originality, and new concepts.

METHODOLOGY (CONTINUED)

ACTIVITIES

Staff/Faculty Engagement
ONU invited all faculty and staff to each participate in two modified World Café activities, described below. The activities were led by Benefactor Group and took place on ONU's campus in August 2022.

Twelve stations were set up around the Ballroom, with trained ONU faculty and staff hosts assigned to each station. Questions focused on participants' vision for the future of the University (see Appendix for a list of questions). Hosts shared a question or provocative proposition with participants and asked them to write responses on note cards. Hosts acted as facilitators and recorders, guiding the discussion if it strayed off topic and capturing significant themes that arose from the conversations.

Participants were free to move as they wished between different stations. They could listen to the prompt, provide a response, and move on. Or, they could stay to listen and engage with their peers in thoughtful conversation around the topics. Benefactor Group acted as timekeepers, reminding participants when to move if they hoped to participate in all of the table topics, and answered questions that arose.

With the help of the table hosts, Benefactor Group gathered documentation at the conclusion of each of the two sessions. This data collected from the activity informed the analysis portion of the process, described in detail below.

In addition to the August activity, ONU staff and faculty members were surveyed for their opinions and feedback via online surveys in August and September 2022.

Board of Trustees Survey
During the August 2022 Board of Trustees meeting, ONU staff provided an overview of the Strategic Planning process. Following this presentation, Trustees, Campaign Steering Committee members, and Trustee Fellows were invited to answer questions about ONU's future and provide feedback via an online survey developed by Benefactor Group. See Appendix for a list of discovery questions.

Focus Groups
Benefactor Group conducted seven focus groups with key constituencies. The cohorts included in each focus group are listed below.

- Staff and Faculty Councils
- College Advisory Boards
- Alumni Advisory Board
- Student Senate & Residence Life Student Leadership
- President's Cabinet
- LRISP Board Committee
- ONU Hosts from the August 18 event and Student Affairs staff

Analysis
Following the discovery phase, Benefactor Group collected and reviewed all qualitative and quantitative discovery data, documents related to the University, best practices from other institutions' plans, and research from experts in the higher education field. Benefactor Group made the raw discovery data available for review by ONU. Throughout the process, over 400 individuals participated in discovery, resulting in almost 2,000 discrete comments.

The raw data from surveys, focus groups, and other activities underwent automated text analysis complemented with careful categorization by the Benefactor Group team to identify the most common themes. From this, Benefactor Group reviewed the gathered information, analyzed and discussed, and developed findings for the University's consideration.

Benefactor Group shared the discovery phase findings with Ohio Northern University through a short written report (see the Appendix for a copy of the findings report). The report included the following:

- Summary of the methodology;
- Topics/questions used in discovery tools;
- Significant themes; and
- Potential frameworks for the plan's strategic pillars.

The discovery report was presented to Ohio Northern University's Core Group for review and refinement prior to being shared with the Board of Trustees in October 2022.

METHODOLOGY (CONTINUED)

DREAM

Following the discovery phase, the ONU Board of Trustees, staff, faculty, and administrators worked with Benefactor Group to outline the elements of the strategic plan throughout the dream and design phases. The elements of the plan are described below.

- **Pillar:** Area of focus of the plan.
- **Declaration:** A statement that describes the desired future.
- **Measures of Success:** The data points that will be used to evaluate success. Each measure has a baseline and target value.
- **Objectives:** One or more categories of activities to achieve the goal (Note: these are "smart": i.e., specific, measurable, attainable, relevant, and time-bound).
- **Tactics:** The specific actions that will achieve the objective.

Board of Trustees Engagement

To affirm the direction of the plan, the Board of Trustees engaged in a discussion facilitated by Benefactor Group during the October 2022 meeting. This conversation was informed by the discovery findings which were shared with the Board ahead of time.

Throughout the four rounds of discussion, the Trustees discussed the following questions/prompts:

- What are the key objectives ONU should focus on in the next five years to advance this pillar?
- Prioritize key objectives for ONU to focus on to advance this pillar.
- What are the opportunities and risks/challenges associated with this pillar and the accompanying objectives?

From these conversations, the Board of Trustees affirmed five areas of focus central to the plan – Culture, Teaching & Learning, People, Place, and Sustainability. The Trustees also developed Objectives under each pillar to be considered during the subsequent steps.

METHODOLOGY (CONTINUED)

DESIGN

With the areas of focus established, the project transitioned to the Design Phase. Throughout this phase, University stakeholders refined objectives and developed measures of success and tactics with support from Benefactor Group.

Pillar-Specific Task Forces

To further shared governance within the project, ONU involved members of the campus community in task forces specific to the pillars of the strategic plan. This cross-functional group represented the voices of 97 staff, faculty, and administrators at ONU. The task forces provided feedback on the pillars, descriptions, and objectives. Additionally, each task force recommended measures of success and tactics for their pillar. Prior to each of the meetings, Benefactor Group shared relevant materials with each of the task forces to frame the conversations.

Task force members attended three virtual meetings in November and December 2022.

- **Meeting 1:** President Baumann provided opening remarks to all task force members to solidify the purpose and objectives of the task forces. In small groups (organized by pillar), Benefactor Group facilitators reviewed the pillar, declaration, and objectives with each pillar-specific task force. Task force members made suggestions for revisions to the pillars, declarations, and objectives.
- **Meeting 2:** The second meeting focused on the development of proposed measures of success for each objective.
- **Meeting 3:** The third meeting focused on identifying tactics that ONU could use to achieve each of the objectives. As a result of feedback from the LRISP Board Committee, it was determined that the "Culture" pillar would be addressed throughout the strategic plan and in a separate Belonging, Inclusion, and Diversity plan. The Culture task force focused on the People pillar during the third meeting.

After each task force meeting, Benefactor Group summarized the meeting output, which was then shared with the Core Group and LRISP Committee of the Board of Trustees. These groups made additional revisions to the working version of the strategic plan, which was shared with the task forces in advance of the next meeting.

Draft Strategic Plan

The work of the Pillar-Specific Task Forces, the Core Group, and the LRISP committee was combined into a single, draft strategic plan document. This full draft, in addition to information regarding the estimated resources required to carry out the vision for each area, was presented to the LRISP committee on January 10, 2023. LRISP Committee members present voted unanimously to move the draft forward to the Board of Trustees.

The draft strategic plan was shared with all ONU staff and faculty at the end of January 2023 for comment.

Board Approval

The plan was submitted to the Executive Committee in late January 2023 and was approved by the Board of Trustees in February 2023.

IMPLEMENTATION

With the approval of the strategic plan by the Board of Trustees, Ohio Northern University will begin the process of implementation. ONU distributes operational planning to the appropriate team within the University. These teams are responsible for developing the activities related to each tactic, setting the baseline and target for each measure of success, and timeline for completion.

The strategic plan will be monitored by the committees of the Board of Trustees. The LRISP Committee will track overall progress of the plan. The Student Success & Program Quality Committee will monitor Teaching & Learning and People activities. The Financial Strength & Sustainability Committee will monitor Sustainability and Place activities. The University's Office of Institutional Research will maintain the strategic plan dashboard that updates stakeholders on progress towards the desired goals.

ACKNOWLEDGEMENTS

Stronger Together: A Strategic Plan for Ohio Northern University reflects the input of more than 400 stakeholders in the Northerner community. Students, faculty, staff, trustees, alumni, and other community members shared their feedback and aspirations for the University over the next five years and beyond. We appreciate the input from those who engaged with World Café conversations, focus groups, task force meetings, surveys, and drafts of the plan. Please see the Appendix for a complete list of Pillar-Specific Task Force members.

The LRISP Committee was charged with overseeing the strategic planning process from a board perspective. Throughout the process, the committee met to review, discuss, and shape the document. We are appreciative of their time, and we extend gratitude to all members of the Board of Trustees for their oversight and involvement in the endeavor.

We extend special thanks to members of the Strategic Plan Core Group, including Jason Broge (Vice President for Financial Affairs), Dr. Juliet Hurtig (Provost and Vice President for Academic Affairs), Shannon Spencer (Vice President for University Advancement), and Dr. Adriane Thompson Bradshaw (Vice President for Student Affairs). We also thank William Eilola (Vice President for Enrollment Management) for his contributions to the plan. Dr. Kelly Lawrie (Assistant Vice President for University Advancement) and Jennifer Roby (Executive Administrative Assistant and Secretary to the Board) provided support with project management and logistics.

Each voice and perspective contributed to making the plan what it is today. Without the Ohio Northern community, this plan would not be possible. Thank you.

SUMMARY OF ACTIVITIES & PARTICIPANTS

- Staff & Faculty Activity (August 18; 300+ participants)
- Board of Trustees Survey (August 23 to September 9; 25 responses)
- Staff & Faculty Survey (August 30 – September 9; 156 responses)
- Board of Trustees LRISP Committee Focus Group (September 6; 9 participants)
    - Follow Up Survey (5 responses)
- President's Cabinet Focus Group (September 9; 14 participants)
- Administrative Staff and Support Staff Councils Focus Group (September 9; 10 participants)
- Student Affairs Staff and the August 18 Facilitators Group (September 9; 10 participants)
- Student Senate and Residence Life Student Leadership Focus Group (September 14; 40+ participants)
- College Advisory Boards (Arts & Sciences, Business, Engineering, Law, and Pharmacy) and Alumni Advisory Board Focus Group (September 20; 20+ participants)
    - Follow Up Survey (6 responses)
- University Council Focus Group (September 20; 15+ participants)
    - Follow Up Survey (6 responses)
- Staff & Faculty Survey 2 (September 26 – September 30; 14 responses)
- Board of Trustees Activity (October 14; 20+ participants)
- Staff & Faculty Survey 3 (October 28 – November 5; 56 responses)
- Pillar Specific Task Forces (November 10 – December 15; 97 task force members)
- Board of Trustees LRISP Committee (December 5 – January 10; 14 members)