The Penn State Strategic Plan - Priorities for Excellence - 2009-2010 through 2013-2014
Strategy Implementation Matrix

<table>
<thead>
<tr>
<th>Goal 1. Enhance Student Success</th>
<th>Leadership (P - Primary S - Secondary O - Other)</th>
<th>Fiscal Impact of Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategies</td>
<td>University Faculty Senate Academic Leadership Council Graduate Council VP and Plan for Undergraduate Education Sr VP for Research and Dean of the Graduate School VP for Student Affairs VP for Educational Equity VP for Common-wealth Campuses Sr VP for Development and Alumni Relations VP for Outreach Rock Ethics Institute</td>
<td>Projected Year</td>
</tr>
<tr>
<td>1.1 Expand Learning Outcomes Assessment</td>
<td>9 S O P O O</td>
<td>1 Cost Neutral</td>
</tr>
<tr>
<td>1.2 Expand and Promote Opportunities for Students to Engage in Research and Active Learning</td>
<td>11 O O P O P O</td>
<td>1 Minimal Investment</td>
</tr>
<tr>
<td>1.3 Improve Key Student Transition Experiences</td>
<td>12 O P O O</td>
<td>1 Minimal Investment</td>
</tr>
<tr>
<td>1.4 Encourage Better Advising and Student Ownership of Education</td>
<td>13 O S P O O</td>
<td>2 Cost Neutral</td>
</tr>
<tr>
<td>1.5 Promote and Support High Quality Graduate Education</td>
<td>14 S O P O O</td>
<td>3 Large Investment</td>
</tr>
<tr>
<td>1.6 Assist Students to Explore Ethical Issues in Their Professional and Personal Lives</td>
<td>14 S P O O O</td>
<td>2 Minimal Investment</td>
</tr>
</tbody>
</table>

Selected Performance Measures

- Percentage of academic programs with specified learning objectives
- Percentage of academic programs with a formal assessment plan
- Percentage of undergraduates who have participated in academic research with faculty outside of class, written a thesis, or completed a capstone project
- First-year and third-year undergraduate retention rates
- Four-year and six-year undergraduate graduation rates
- Graduate student completion rate
- Average graduate student time-to-degree
- Participation in LEAP, iLEAP, and STEP
- Selected measures from the National Survey of Student Engagement (NSSE) such as "Level of Academic Challenge", "Active and Collaborative Learning", "Student-Faculty Interaction", "Enriching Educational Experiences", "Supportive Campus Environment" and "Percent of students reporting having completed a practicum, internship, field experience, co-op experience, or clinical assignment"
- Percentage of students reporting that Penn State contributed to their "developing a personal code of values and ethics"

Fiscal Impacts on Operating Budget

- Cost Neutral - no new expenditures required; no costs saved; existing resources redeploied
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Performance Measures Key:
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# Goal 2. Advance Academic Excellence and Research Prominence

## Strategy Implementation Matrix

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<tr>
<th>Strategy</th>
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</thead>
<tbody>
<tr>
<td>2.1 Focus on Faculty Recruitment and Retention for Excellence</td>
<td></td>
<td>Large Investment</td>
</tr>
<tr>
<td>2.2 Foster Research, Instruction, and Outreach in Emerging, Interdisciplinary Fields of Great Societal Importance</td>
<td></td>
<td>Large Investment</td>
</tr>
<tr>
<td>2.3 Enhance the College of Medicine’s Research and Clinical Capabilities in Central Pennsylvania</td>
<td></td>
<td>Large Cost Savings/ Efficiency Improvement</td>
</tr>
<tr>
<td>2.4 Consolidate Academic and Administrative Programs through Targeted Reviews</td>
<td></td>
<td>Large Cost Savings/ Efficiency Improvement</td>
</tr>
<tr>
<td>2.5 Acquire Additional Endowments to Enhance Faculty and Student Quality</td>
<td></td>
<td>Large Revenue Generation</td>
</tr>
</tbody>
</table>

### Selected Performance Measures

- Percentage of full-time faculty with tenure or on the tenure-track
- Percentage of full-time faculty on fixed-term, multi-year appointments
- Tenure success rate
- Total research expenditures
- Number of extramural research awards
- Average amount of research awards
- Number of budgeted joint appointments
- Number of targeted reviews of academic programs
- Number of baccalaureate degree programs that have been eliminated or consolidated
- Number of graduate degree programs that have been eliminated or consolidated
- Number of associate degree programs that have been eliminated or consolidated
- Number of administrative programs that have been eliminated or consolidated
- Number of graduate assistantships and fellowships
- Total funds available for graduate assistantships and fellowships
- Number of endowed chairs, professorships, and faculty fellowships
- Percentage of tenured faculty holding endowed chairs, professorships, and faculty fellowships
- Total funds available for endowed chairs, professorships, and faculty fellowships

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### Goal 3. Realize Penn State's Potential as a Global University

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<thead>
<tr>
<th>Leadership</th>
<th>(P - Primary  S - Secondary  O - Other)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>3.1 Establish the Office of Global Programs as the Locus of the University’s International Strategy</strong></td>
<td></td>
</tr>
<tr>
<td>Project Year</td>
<td>Moderate Investment</td>
</tr>
<tr>
<td>24</td>
<td>O</td>
</tr>
<tr>
<td><strong>3.2 Build International Partnerships at Home and Abroad</strong></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>O</td>
</tr>
<tr>
<td><strong>3.3 Expand Opportunities for Education Abroad and International Visiting Scholars</strong></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>O</td>
</tr>
<tr>
<td><strong>3.4 Infuse International Topics and Experiences into Instruction</strong></td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>S</td>
</tr>
<tr>
<td><strong>3.5 Increase International Student Enrollments</strong></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>O</td>
</tr>
</tbody>
</table>

**Selected Performance Measures**

- *Global Engagement Node institutions with whom Penn State has a defined partnership*
- Number of students participating in Education Abroad
- Percentage of students participating in Education Abroad
- Number of international visiting faculty scholars
- Percentage of undergraduate Education Abroad participants by region of study
- Percentage of graduate Education Abroad participants by region of study
- Percentage of undergraduate international students by region of home country
- Percentage of graduate international students by region of home country
- Number of courses identified with "International Cultures" designation
- Number of courses with embedded international experiences
- Number of students who pursue advanced foreign language
- Percentage of Total Undergraduate Enrollment by International Status
- Percentage of Total Graduate Enrollment by International Status

**Fiscal Impacts on Operating Budget**

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### The Penn State Strategic Plan - Priorities for Excellence - 2009-2010 through 2013-2014

**Strategy Implementation Matrix**

#### Goal 4. Maintain Access/Affordability and Enhance Diversity

<table>
<thead>
<tr>
<th>Goal</th>
<th>Leadership (P - Primary</th>
<th>S - Secondary</th>
<th>O - Other)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>President and Board of Trustees</td>
<td>Executive Vice President and Provost</td>
<td>University Faculty Senate</td>
</tr>
<tr>
<td>4.1 Position the Commonwealth Campuses for Access and Affordability</td>
<td>P</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>4.2 Invest Selectively in Capital Improvements and Student Services at the Campuses</td>
<td>O</td>
<td>O</td>
<td>P</td>
</tr>
<tr>
<td>4.3 Allocate Additional Funds from Tuition for Need-Based Student Aid</td>
<td>P</td>
<td>S</td>
<td>P</td>
</tr>
<tr>
<td>4.4 Sustain Investment in For the Future: The Campaign for Penn State Students</td>
<td>S</td>
<td>O</td>
<td>P</td>
</tr>
<tr>
<td>4.5 Build on the Framework to Foster Diversity</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

**Selected Performance Measures**

- Amount of the tuition differential between University Park and other Penn State undergraduate campuses
- Percentage of students receiving need-based institutional scholarships
- General Funds available for need-based aid
- Total funds available for need-based aid
- Total unmet need
- Progress in meeting the "Ensuring Student Opportunity" goal of the "For the Future" capital campaign
- Percentage of full-time faculty by demographic group
- Percentage of full-time staff by demographic group
- Percentage of undergraduate enrollment by demographic group
- Six-year baccalaureate degree graduation rates by demographic group
- First-year and third-year retention rates by demographic group
- Percentage of graduate enrollment by demographic group
- Completion rates for graduate students by demographic group
- Average time-to-degree for graduate students by demographic group
- Tenure success rate of faculty by demographic group

**Fiscal Impacts on Operating Budget**

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### The Penn State Strategic Plan - Priorities for Excellence - 2009-2010 through 2013-2014

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<thead>
<tr>
<th>Goal 5. Serve the People of the Commonwealth and Beyond</th>
<th>Leadership (P - Primary  S - Secondary  O - Other)</th>
<th>Fiscal Impact of Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1 Deliver More PSU Programming Using Technology and Media</td>
<td>35 O P S O</td>
<td>1/2 Large Revenue Generation</td>
</tr>
<tr>
<td>5.2 Consolidate Specialized Services at Regional and Campus Sites</td>
<td>35 P P P O</td>
<td>2/3 Moderate Cost Savings/ Efficiency Improvement</td>
</tr>
<tr>
<td>5.3 Share Programs, Faculty, Staff, and Facilities within Regions</td>
<td>36 P O O O O P</td>
<td>1 Large Cost Savings/ Efficiency Improvement</td>
</tr>
<tr>
<td>5.4 Re-Mission Some Campuses, if Necessary</td>
<td>37 P O O O O O</td>
<td>Moderate Cost Savings</td>
</tr>
<tr>
<td>5.5 Create a More Entrepreneurial Approach to Service Delivery</td>
<td>38 O P P O</td>
<td>2 Moderate Revenue Generation</td>
</tr>
</tbody>
</table>

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#### Selected Performance Measures
- Number of online/blended learning courses
- Headcount enrollment in online/blended learning courses with breakout for resident instruction
- Percentage of resident instruction students taking World Campus courses
- Number of community outreach functions co-located at a Penn State campus
- Enrollment in academic programs shared within regions
- Number of faculty and staff shared across campuses
- Non-traditional student enrollments
- Pennsylvania citizens’ participation with Penn State
- "Return on Investment" for Outreach programs
<table>
<thead>
<tr>
<th>Goal 6. Use Technology to Expand Access and Opportunities</th>
<th>Leadership (P - Primary  S - Secondary  O - Other)</th>
<th>Fiscal Impact of Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.1 Expand the World Campus and Other Online Educational Offerings</td>
<td>40 O S P O O 1</td>
<td>Large Revenue Generation</td>
</tr>
<tr>
<td>6.2 Invest in Robust/Flexible IT Infrastructure for Teaching, Research and Administration</td>
<td>41 O</td>
<td>Large Investment/ Efficiency Improvement</td>
</tr>
<tr>
<td>6.3 Re-Balance Centralized/Dispersed Facilities/Services for Greater Efficiency and Effectiveness</td>
<td>43 O</td>
<td>Large Investment/Large Cost Savings</td>
</tr>
<tr>
<td>6.4 Protect the Security and Integrity of the IT Infrastructure</td>
<td>43 O</td>
<td>Large Investment</td>
</tr>
</tbody>
</table>

Selected Performance Measures
- Enrollment in World Campus programs
- "Return on investment" for World Campus programs
- Usage and growth of digital repositories
- Percentage of faculty reporting use of Open Educational Resources (OER) materials
- Cost for "commodity" information technology services
- Percentage of faculty and staff computers with anti-virus software, spyware detection software, and adware detection software installed
- Percentage of faculty and staff laptops with full disk-drive encryption
- Percentage of Penn State's merchants who are Payment Card Industry (PCI) compliant
- Percentage of University units meeting current security standards

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<tr>
<th>Goal 7. Control Costs and Generate Additional Efficiencies</th>
<th>Leadership (P - Primary S - Secondary O - Other)</th>
<th>Fiscal Impact of Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>7.1 Improve Instructional Productivity</strong></td>
<td>P O O</td>
<td><strong>Large Cost Savings</strong></td>
</tr>
<tr>
<td><strong>7.2 Better Utilize Instructional and Research Facilities</strong></td>
<td>O O O P P O</td>
<td><strong>Large Cost Savings/ Efficiency Improvement</strong></td>
</tr>
<tr>
<td><strong>7.3 Reduce the Rate of Increase of Health Care Costs</strong></td>
<td>O O O P P</td>
<td><strong>Large Cost Savings</strong></td>
</tr>
<tr>
<td><strong>7.4 Develop Frameworks for Greater Budgeting and Staffing Flexibility</strong></td>
<td>O P</td>
<td><strong>Large Cost Savings/ Efficiency Improvement</strong></td>
</tr>
<tr>
<td><strong>7.5 Modify Central Recycling and Introduce Investment Models for New Initiatives</strong></td>
<td>P O O</td>
<td><strong>Large Cost Savings/Large Revenue Generation</strong></td>
</tr>
<tr>
<td><strong>7.6 Cap University Allocations to Outreach (2010-11)</strong></td>
<td>P</td>
<td><strong>Large Cost Savings</strong></td>
</tr>
<tr>
<td><strong>7.7 Promote Continuous Quality Improvement and Reward Innovation</strong></td>
<td>P P</td>
<td><strong>Large Cost Savings/ Efficiency Improvement</strong></td>
</tr>
<tr>
<td><strong>7.8 Establish and Foster Sustainable Environments</strong></td>
<td>O P O S</td>
<td><strong>Large Cost Savings/ Efficiency Improvement</strong></td>
</tr>
</tbody>
</table>

**Selected Performance Measures**
- Percentage of academic units with transparent workload policies
- Student credit hours per instructional faculty full-time equivalent
- Cost/student credit hour
- Percentage of sections that are under-enrolled
- Utilization rate of classroom space
- Enrollment in Summer Session
- Rate of increase of health care costs
- Percentage of staff on full-time, year-around appointments
- Revenue generated from "angel investor" initiatives
- Percentage of recycled funds from vertical cuts
- Number of Continuous Quality Improvement (CQI) teams
- Research focused on sustainability
  - Number of projects or grants
  - Dollar value of project or grants
- Number of Academic Offerings focused on sustainability education
- Number of Academic Offerings that incorporate sustainability into the curriculum
- Greenhouse gas emissions
- Greenhouse gas reductions
- Quantity of environmentally-responsible purchases versus standard purchases

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