



# THE TEXAS A&M UNIVERSITY SYSTEM

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## Board of Regents

### Strategic Plan

2016 – 2021

September 1, 2016

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THE TEXAS A&M  
UNIVERSITY SYSTEM

Dear Members of The Texas A&M University System Community:

Since our last strategic plan (2009-2013), we have made tremendous progress in providing education, conducting research, and delivering services and training to the people of Texas and beyond. We are proud of our collective accomplishments and recognize this progress would not have been possible without each and every one of you, your commitment to the mission of our land-grant system, and your hard work.

As we look toward the future, we are very aware of the forces reshaping higher education and putting pressure on traditional higher education business models. We live in a dynamic, ever-changing world where the demands placed on higher education institutions, especially large public systems like ours, continue to evolve and increase in complexity. And as a land-grant system, we embrace the responsibility to be responsive to these needs:

- Changes in employer expectations and student career trajectories are challenging us to think in new ways about how to best educate our students and how to provide them with the types of experiential learning opportunities that prepare them for the increasing demands of the workplace and to be well-rounded and engaged citizens.
- Changes in student demographics are encouraging us to think intentionally about the type of support we need to provide our students to succeed.
- The increasingly competitive climate for research funding is inspiring us to think in new ways about collaboration across disciplines, schools, and campuses, and how to leverage our core strengths in research to establish areas of sustainable competitive advantage.
- The growing population of Texas and the growing needs of the local economy are stimulating us to think about innovative ways to make our services, our training, and the translational benefits of our research accessible to the broader public.
- And finally, the evolving financial realities of our system renew our commitment to ensuring that The Texas A&M University System is a responsible and effective steward of our resources and will continue to sustainably deliver excellence in education, research, and services.

In the midst of all these changes, we are confident that with your help, we can not only stay the course, but accelerate progress. As a system of individual member institutions, we are so much more than the sum of our parts. Our diversity makes us strong, and the distinctive combination of universities and agencies, under one system umbrella, makes us uniquely positioned for success going forward.

This strategic plan is the product of a yearlong process which builds on the individual strategic plans of the member institutions and incorporates input from all member institutions. It builds on our strengths, but also presents a bold vision for the future. It is designed to be a living plan that we are committed to monitoring as we execute. We will measure our progress and success, but we will also be flexible in our execution and adjust course as needed. We will do this together, and together we will be one of the finest university systems in the nation.

Sincerely,

Cliff Thomas  
Chair, Board of Regents

John Sharp  
Chancellor

## I. EXECUTIVE SUMMARY

### Who We Are: Mission and Core Principles

**We are a land-grant system of 11 universities and 7 agencies. Our mission is to provide education, conduct research, commercialize technology, offer training, and deliver services for the people of Texas and beyond through our universities and state agencies.**

- As a land-grant system, we embrace our responsibility to serve the state of Texas. This means we will ensure that we provide access to excellent quality education to qualified Texans through our universities and agencies, that our research will be connected to and beneficial for the Texas community, and that our services support and enable citizens, organizations, and businesses throughout Texas. In addition, we believe our role as a national and international leader in education, research, and services will bring great benefits to the state of Texas by attracting students, funding, and innovation from all around world.
- As a system of distinct institutions, we are greater than the sum of our parts, with the contributions of our member universities and agencies extending well beyond their individual campuses. One of the great strengths of the A&M System is the breadth of capabilities our various member institutions bring. As a system, we are successful – in our education, research, and service missions – when we combine complementary capabilities in the pursuit of excellence and access for our constituents.

The Board of Regents recognizes its responsibility to set the vision and priorities for the A&M System, but believes System and institution leaders are best positioned to determine the means for achieving these priorities. With this in mind, the plan aims to provide direction on the goals of the A&M System, but leaves tactics to System and member leaders. The Board of Regents also recognizes the need for an accountability process and has committed to regularly reviewing progress against these goals as part of the ongoing work of the Board of Regents.

### Three core principles guide us in the pursuit of our mission:

- 1. Excellence:** We will pursue excellence in **education** by preparing our students for long-term success. We will pursue excellence in **research** by attracting top-tier researchers and significant research funding to our system and by investing in breakthrough research. We will pursue excellence in **service** by aligning our offerings to the specific needs of Texas and by delivering high-quality training.
- 2. Impact:** We will aim not just for excellence, but for impact. Our graduates will be engaged citizens who contribute to the growth of our economy and the well-being of our society, and will be prepared to succeed in an increasingly global work and life environment. Our researchers, whether in universities or in agencies, will translate research into practical solutions that address the needs of our local communities, the nation and the world at large. Our institutions will have a lasting impact on Texas, the nation, and the world by delivering services to meet the needs of our communities.
- 3. Access and Affordability:** We are committed to providing a high-quality education at a reasonable price to remain accessible to the people of Texas, regardless of their socio-economic situation. We will leverage our physical presence in all counties of Texas and innovative technology to make services and translational research widely available to the people and organizations of Texas.

## Our Vision: Imperatives for the Future

Consistent with our Mission and Core Principles, we have developed a vision that defines success over the next five years. **We intend to be the system of choice for students, employers, faculty and staff, and research funders.** To make this vision a reality, we expect the A&M System to work towards the following imperatives:

- 1. All qualified students will find a place in the A&M System and will have an array of pathways to pursue their ambitions and interests.** We will develop a coordinated recruitment and admissions strategy for the A&M System and create coherent pathways among institutions.
- 2. The A&M System will remain affordable and accessible.** We will continue to ensure our costs remain reasonable so that the cost of education does not become a barrier for Texans to access the A&M System.
- 3. Our students will leave the A&M System as responsible and engaged citizens prepared for successful careers in an increasingly global economy.** Our member institutions will develop the educational experiences, experiential opportunities, and service opportunities our students need to succeed post-graduation in a global economy.
- 4. The A&M System will increase its prominence by building a robust and targeted research portfolio.** We will continue to encourage cross-institution and cross-discipline collaboration, and we will support our member institutions in their research pursuits, including obtaining emerging research status.
- 5. The A&M System will provide services that respond to the needs of the people of Texas and contribute to the strength of the state’s economy.** We will continue to address the needs of Texas and utilize technology to reach citizens in new ways.
- 6. The A&M System, in adhering to the high standard of excellence and growth required in this strategic plan, will display prudent financial stewardship and sustainability.** Our member institutions will be diligent about their plans for growth, and the A&M System will ensure financially sound decision-making at the aggregate level. We have robust financial management capabilities in place and will continue to manage the A&M System’s financial health in a holistic manner.

We will be able to accomplish these imperatives by relying on the strength and the commitment of our people, both faculty and staff. As a system, we recognize the important contributions of faculty and staff, and are committed to recruiting, retaining, and supporting the talent that is so critical to our collective success.

## Our Accountability: How We Will Measure Success and Monitor Progress

As a governing board for a diverse system of distinct individual institutions, we embrace our governance role. This plan does not outline specific strategies or tactics to pursue the mission, vision, and imperatives outlined above. Rather, we intend this plan to make clear our aspirations and expectations for the A&M System and member institutions; we then look to the A&M System leadership and member institutions’ leadership to continue to develop plans that leverage their strengths and unique contexts to find success.

However, we also seek to ensure that the Board of Regents is actively engaged in its governance role and that this plan serves as a living document to focus our attention and the A&M System’s attention on the key imperatives we embrace. Thus, we have articulated a set of accountability statements that we will focus on as a Board on a regular basis to ensure we measure our success, monitor progress, and actively engage with the A&M System leadership to pursue our goals over the next five years. The measures of success are highlighted below.

<p><b>1. All qualified students will find a place in the A&amp;M System and will have an array of pathways to pursue their ambitions and interests.</b></p>	<p><b>1.</b> Yield of admitted applicants at the A&amp;M System level  <b>2.</b> Share of total Texas postsecondary enrollment over time  <b>3.</b> Share of top 10% of Texas high school graduates who join the A&amp;M System over time  <b>4.</b> Share of Texas high school graduates who join the A&amp;M System that are in the top 10% in terms of SAT scores</p>
<p><b>2. The A&amp;M System will remain affordable and accessible.</b></p>	<p><b>5.</b> Ratio of student debt to median family income  <b>6.</b> Percentage of cohort designated as first generation students, underrepresented students, Pell grant recipients  <b>7.</b> Time-to-degree (matriculation to graduation, accounting for transfers)</p>
<p><b>3. Our students will leave the A&amp;M System as responsible and engaged citizens prepared for successful careers in an increasingly global economy.</b></p>	<p><b>8.</b> Improvement in absolute persistence rates and graduation rates over time  <b>9.</b> Actual vs. expected persistence and graduation rates  <b>10.</b> Placement rates six months after graduation (including employment, graduate school enrollment, service placements)  <b>11.</b> Salaries at third and fifth years following graduation  <b>12.</b> Student Return on Investment</p>
<p><b>4. The A&amp;M System will increase its prominence by building a robust and targeted research portfolio.</b></p>	<p><b>13.</b> Total A&amp;M System-wide research expenditures (\$)  <b>14.</b> Total volume of research activities across the A&amp;M System  <b>15.</b> Number of National Academy members  <b>16.</b> Progress toward emerging research status</p>
<p><b>5. The A&amp;M System will provide services that respond to the needs of the people of Texas and contribute to the strength of the state’s economy.</b></p>	<p><b>17.</b> Number of degrees granted in critical fields identified by the state  <b>18.</b> Number of agency contact hours  <b>19.</b> Number of services provided (e.g. diagnostic samples processed, fires fought, emergency rescues)</p>
<p><b>6. The A&amp;M System, in adhering to the high standard of excellence and growth required in this strategic plan, will display prudent financial stewardship and sustainability.</b></p>	<p><b>20.</b> Composite Financial Index (CFI) – Actual and Forecasted  <b>21.</b> Reserve ratio  <b>22.</b> Administrative cost ratio  <b>23.</b> Return on Investable Assets  <b>24.</b> State appropriations / Full-time student equivalent  <b>25.</b> Tuition and fees / Full-time student equivalent  <b>26.</b> Expansion of donor base and overall funds raised</p>

Enumerating measures of success is only the beginning. Through our strategic planning process, we have renewed our commitment to building this plan and measuring its success. We will integrate this effort into our ongoing work by creating a process that will ensure we regularly review and ask questions about the progress we are making towards our goals. We will achieve this by doing the following:

- The Board of Regents will hold the A&M System accountable to the strategic plan.
- The A&M System will leverage the existing annual programmatic review process to monitor progress against the strategic plan imperatives and measures of success, and address any issues that arise.
- This process will also be used to facilitate the development of institutional-level growth plans and the synthesis of those plans into a systemwide understanding of growth and its implications.

## II. OUR CONTEXT

### The Higher Education Landscape and the Needs of Texas

The dynamic nature of higher education in the United States continues to present unique challenges to colleges and universities across the country. Teaching methods, learning tools, faculty and student research methods, and post-graduate employment opportunities are all changing in ways that require coordinated, strategic responses. In Texas, demographic changes and dramatic population growth add complexity to an already shifting landscape. These trends, described in more detail below, have significant implications for how The Texas A&M University System will achieve its mission and remain committed to its core principles.

- **The nature of work is changing.** Students graduating in the next five years will face a vastly different career landscape than past generations. They will have multiple careers – not just multiple jobs – over the course of their lifetime. These changes will demand a durable set of skills to ensure long-term success. Further, technical industries will require specific forms of training and many jobs benefit from on-demand learning opportunities. This means a variety of education approaches – allowing for lifelong learning, not just a one-time college degree – will be required to help prepare students for their rapidly evolving careers. The A&M System will not only be able to provide traditional degree opportunities through its universities, but will also continue to provide non-degree learning opportunities (e.g. courses, certifications, targeted training) through both its agencies and universities.
- **The nature of teaching and learning is changing.** The demand for higher education is shifting. While traditional degree programs will remain a critical part of our education system, training programs, alternative credentials, and competency-based programs are growing and will address the educational needs of the workforce going forward. Given these shifts, agency and non-traditional campus programs will play a growing role in fulfilling the needs of the future workforce. The A&M System will address these diverse educational needs by building on existing training, credentialing, and certificate options.
- **The nature of research is changing.** Today, the major issues in industry, government, and society are complex and multifaceted. Solving these issues requires bringing together scholars, technical experts, and industry professionals from a wide range of disciplines. However, traditional academic structures can often be a barrier to building the cross-sector teams needed to address major issues. In order to provide the interdisciplinary response to address today’s challenges, research efforts must increasingly be based on collaboration across departments and campuses and might even involve partners from industry sectors. Research funders see the value of this interdisciplinary approach and are shifting funding models to support larger-scale collaborative projects. This trend presents an opportunity for the A&M System to harness its collective research capabilities across member universities and agencies. Finally, the commercialization of research is changing. An increasing share of new technology is coming from entrepreneurial environments, requiring institutions to provide additional support to researchers within the A&M System.



- **The profile of the student population is changing.** The college-aged population in Texas is booming. Between 2010 and 2014, the 18-20 year old population in Texas grew 4.5%. Nationally, this college-aged population grew only 0.6% over the same time period. The demographic composition of these prospective students continues to evolve and is much different today than it was years ago. In 2010, 61% of Texas students graduating high school were minorities. In 2014, 66% of Texas high school graduates were minorities. As these demographic shifts occur, higher education institutions must be responsive in how they serve their student body and how they prepare them for success beyond college. Educating and serving these historically under-represented populations will require a new, differentiated approach to student support systems. Given the A&M System’s mission, it is critical that each university and agency consider the distinct demographics of the citizens they serve.
- **The needs of Texas are growing.** The rapid population growth described above is not limited to college-aged Texans. The overall population growth implies an increasing demand for the services that A&M System members provide. A&M System members are already leveraging technology to increase their capacity to deliver practical, research-informed solutions to the broader public. Continued growth will require new and creative uses of technology to expand the methods of service delivery going forward.
- **The world of higher education is increasingly global:** Our economy is increasingly global and it is affecting how higher education institutions operate, how they prepare students, and what educational and research partnerships they pursue. During their college years, our students benefit from classroom and social experiences that open them up to different cultures and languages. They also benefit from a growing number and variety of study abroad experiences. Once they graduate, many of our students will work for multinational companies that have offices

across the globe—many of our alumni will live abroad for at least part of their lives. Our faculty, and ultimately our students, will benefit from the many research collaborations we are able to establish with universities and organizations abroad. Bringing together the best minds to focus on a particular research question, no matter where the people are located, is the best guarantee of long-term success.

### III. OUR IDENTITY

#### We Take Our Mission as a Land-Grant System Seriously

We are a land-grant system of 11 universities and 7 agencies. Our mission is to provide education, conduct research, commercialize technology, offer training, and deliver services for the people of Texas and beyond through our universities and state agencies.

- As a land-grant system, we embrace our responsibility to serve the state of Texas.
- As a system of distinct institutions, we are greater than the sum of our parts, with the contributions of our member universities and agencies extending well beyond their individual campuses.
- Our universities focus on education and research but also achieve much more for the state of Texas. Most of our universities primarily serve their regional constituents and maintain their own academic strengths.
- Our agencies are an important differentiator of the A&M System. Thanks to our agencies, the A&M System is able to serve the broader community to an extent that is unmatched by other university systems. While service and research are the main strengths of the agencies, they are complementary to our universities, even when it comes to education. Through collaboration, agencies empower the universities to succeed.

- While universities and agencies collaborate and often overlap in their functions, they are also very different. This plan is meant to be inclusive of universities and agencies in all areas, however, not all elements apply to both because of their distinct nature.

### Three Core Principles Guide Our Work

Core Principles		
1	Excellence	2 Impact
3	Access and Affordability	

- **Excellence**

We will pursue excellence in **education** by preparing our students for long-term success. We will pursue excellence in **research** by attracting top-tier researchers and significant research funding to our system and investing in breakthrough research. We will pursue excellence in **service** by aligning our offerings to the specific needs of Texas and by delivering high-quality training to the people and organizations of Texas.

The Board of Regents aspires for the A&M System to be a state and national leader in education, research, and service. After thoughtful discussion about the Board of Regents’ desire to emphasize quality in these three areas, “Excellence” emerged as a prevailing principle to strive for. As the first core principle, the Board of Regents believes that excellence should not be sacrificed in the pursuit of other A&M System goals.

- **Impact**

We will aim not just for excellence, but for impact. Our graduates will be engaged citizens who contribute to the growth of our economy and the well-being of our society, and will be prepared to succeed in an increasingly global work and life environment. Our researchers, whether in universities or in agencies, will translate research into practical solutions that address the needs of our local communities, the nation and the world at large. Our

universities and agencies will have a lasting impact in Texas by delivering services to meet the needs of our local and regional communities.

- **Access and Affordability**

We will remain committed to providing a high-quality education at a reasonable price to remain accessible to the people of Texas, regardless of their socio-economic situation. We will leverage our physical presence in all counties of Texas and innovative use of technology to make services and translational research widely available to the people and organizations of Texas.

### Our Successes to Date

As we look forward, we take pride in the A&M System’s progress to date.

- **Improved excellence**

The A&M System has improved educational outcomes. Total full-time enrollment for the A&M System has grown 4% annually between 2011 and 2016. While serving a larger and increasingly diverse student body, the A&M System has been able to increase graduation rates. Between 2011 and 2015, the systemwide six-year graduation rate increased three percentage points. While graduation rates vary across the A&M System, the 2014 systemwide graduation rate of 60% was well above the Texas average for public four-year institutions of 52%. In addition to educational quality, the quality of research and service will continue to be a focus for the A&M System.

- **Increased impact**

The impact of the A&M System’s education, research, and service mission has significantly expanded in recent years. In 2015, more than 30,000 degrees were conferred, an increase of over 4,800 from 2011, demonstrating the educational contributions of the A&M System. In addition, there has been growth in systemwide research. Research expenditures have increased from just above \$850 million

across all universities and agencies in 2011 to over \$945 million in expenditures for 2015. This broad, but also deep presence across the state is a unique strength of the A&M System and provides an unparalleled opportunity to address statewide issues. Finally, the A&M System’s agencies and universities have been recognized as national leaders among their peer organizations.

- **Expanded access and maintained affordability**

The Texas A&M University System is currently serving a larger and more diverse student body. Overall, the System educated 16,000 more full-time students in 2014 than it did in 2010. More than 80% of students at three of the A&M System’s campuses— in Kingsville, Prairie View, and Laredo—are underrepresented students. The A&M System has also remained affordable. Annual tuition and fees at all A&M System campuses remain in line with the state average for in-state tuition and fees at four-year institutions. For 2015-2016, when the Texas average for undergraduate tuition was \$8,347, member tuition and fees ranged from \$5,878 to \$9,988. Between 2011 and 2015, member tuition and fees have increased an average of only 4% annually. Finally, with an active presence in all Texas counties and the leveraging of new technologies, access to services has improved through the continued development of the agencies.

## IV. OUR VISION FOR THE FUTURE

Our vision is to be the system of choice for students, employers of graduates, faculty and staff, and research funders.

### Strategic Imperatives

As we look ahead, achieving this vision will require us to pursue six key strategic imperatives. While all members will have a role in addressing each

imperative, the tactical approaches that member universities and agencies adopt to realize these imperatives will differ given the different contexts of each member. As a coalition of member institutions, each with its own set of strengths and core capabilities, we will deliver results related to each of these key areas.

1. **All qualified students will find a place in the A&M System and will have an array of pathways to pursue their ambitions and interests.**

Being the system of choice for students requires the A&M System to provide new opportunities and pathways for students to pursue their interests. Today, there are more qualified applicants than our universities can educate, and students are often considering only one or a few of the A&M System schools when excellent opportunities for those students might exist elsewhere in the A&M System. There is an opportunity to harness the strength of all member universities in a way that provides new and valuable pathways for students that wouldn’t be possible if pursued by any individual member. One possibility, among others, is to make transfers between institutions more seamless.

These efforts could help place and keep more high-quality students within the A&M System by increasing the share of admitted students who choose to attend a member university over a university outside of the A&M System. These new pathways could also help the A&M System educate a greater share of Texas college students than otherwise possible.

- The A&M System will develop a coordinated recruitment and admissions strategy for the A&M System. Development of this coordinated approach will rely on the joint efforts of the A&M System Offices and leaders from member institutions
- The A&M System will create coherent pathways among institutions

**2. The A&M System will remain affordable and accessible.**

The land-grant mission calls for the A&M System to educate the citizens of Texas. In order to achieve this, the A&M System must ensure that cost and a lack of support for diverse students do not prevent qualified students from attending and finding success at a member institution. To remain affordable, the A&M System will build on its history of keeping tuition reasonable so that cost does not become a significant barrier. To remain accessible, the A&M System must ensure qualified students from all backgrounds are able to attend and have the support they need to succeed in the A&M System. The Board of Regents feels the A&M System should remain accessible to low income and first-generation students, as well as underrepresented students.

- The A&M System will continue to ensure that cost does not become a barrier for Texans to access the A&M System
- A&M System members will provide the differentiated support services needed to continue to serve increasingly diverse student bodies

**3. Our students will leave the A&M System as responsible and engaged citizens prepared for successful careers in an increasingly global economy.**

We embrace the responsibility of preparing our students for success in their careers and lives. The Board of Regents views the primary responsibility of the A&M System as a practical one: to improve the lives of its students by enhancing their career prospects, which in turn helps address the talent needs of Texas employers. The success of this goal won't be determined on day one following completion of a degree or certificate, but years into a graduate's career. This long-term goal implies members must educate well-rounded graduates who are prepared for dynamic careers, not just the first stage of their careers.

Whether enrolled in degree or certificate programs at our universities, or in training

programs through our agencies, students will enjoy greater career prospects upon completion and employers will be able to find the talent they need for economic prosperity. This goal requires our member institutions to develop programs that are responsive to the evolving needs of students and the economy. Additionally, the A&M System aims to provide an experience that will shape students into lifelong learners and engaged citizens, with critical thinking skills they can leverage long after they have left the A&M System.

- Our member institutions will develop the appropriate educational experiences and experiential opportunities, including study abroad experiences, that provide our students with improved immediate and long-term employment outcomes
- The service and leadership opportunities available to students of the A&M System will help shape model citizens who serve their communities through philanthropy, civic engagement, and other forms of service

**4. The A&M System will increase its prominence by building a robust and targeted research portfolio.**

We will continue to encourage cross-institution and cross-discipline collaboration, and we will support our member institutions in their research pursuits, including obtaining emerging research status.

While much of the research is concentrated at Texas A&M University and the agencies, every member institution has a role to play. Given the rising need for collaboration in the pursuit of research opportunities, the A&M System – with its network of diverse members – is well-poised for success going forward. Member universities have a broad range of research specialties and the agencies have remarkable capabilities.

With the appropriate collaboration among members, the A&M System can demonstrate its qualifications for interdisciplinary research in a way that few others in the state or even in the nation can.

- Texas A&M University will become one of the nation’s top research universities
- The A&M System will pursue large-scale, collaborative research opportunities
- The A&M System will support well-positioned member universities in their pursuit of the emerging research university designation or other prominent research classifications

**5. The A&M System will provide services that respond to the needs of the people of Texas and contribute to the strength of the state’s economy.**

The A&M System’s members provide education and research to the state, but also provide more direct forms of service.

University members play a significant role in service through student service programs and other forms of engagement with local communities. Agencies partner with industry leaders to share their innovations and employ a number of Texans.

All A&M System members will adapt to continue meeting the needs of the public as the need for services continues to grow due to population growth and changing demographics.

- All A&M System members will increase service connections across sectors
- A&M System members will address the employment needs of the state by educating for critical fields experiencing shortages
- Agencies will remain leaders in their respective fields and improve reach of services

**6. The A&M System, in adhering to the high standard of excellence and growth required in this strategic plan, will display prudent financial stewardship and sustainability.**

Responsible growth will remain central to the mission of serving Texas as the state

population and the need for quality education continue to grow. The diversity of the state will also call for increased access to the A&M System for underrepresented populations. By continuing to act as a good steward of its resources, the A&M System will build on its strengths and pursue growth that does not put undue stress on the A&M System’s financial health. The A&M System has already developed robust capabilities and processes for managing its financial health in a holistic way, and the A&M System will continue to focus on increasing operational efficiency. A strength of the A&M System’s financial health is its deep understanding of debt management, which will prove invaluable as the A&M System continues to grow responsibly.

- Enrollment growth will be managed and deliberate. Members will undergo a campus-level process to determine their own growth goals as part of the annual programmatic review process
- The A&M System will assist with coordination of program development across campuses to prevent inefficient duplication within a geographic region
- Efficient use of resources will allow for A&M System growth without harming quality or affordability

We will be able to accomplish these imperatives by relying on the strength and the commitment of our people, both faculty and staff. As a system, we recognize the important contributions of faculty and staff and are committed to recruiting, retaining, and supporting the talent that is so critical to our collective success.



## V. OUR ACCOUNTABILITY

### How We Will Measure Success

In an effort to bring accountability to the plan, metrics have been carefully selected as measurements of progress for each of the imperatives. The measures have been kept intentionally simple and few in number to achieve two purposes.

- First, given the varied nature of member universities and agencies, measurements should be widely applicable to the relevant members.
- Second, we believe that quality education, research, and service should be measured in simple ways to reflect the practical goals of the A&M System.

**All qualified students will find a place in the A&M System and will have an array of pathways to pursue their ambitions and interests.**

1. Yield of admitted applicants at the A&M System level
2. Share of total Texas postsecondary enrollment over time
3. Share of top 10% of Texas high school graduates who join the A&M System over time
4. Share of Texas high school graduates who join the A&M System that are in the top 10% in terms of SAT scores

**The A&M System will remain affordable and accessible.**

5. Ratio of student debt to median family income
6. Percentage of cohort over time designated as First-generation students, under-represented students, Pell grant recipients
7. Time-to-degree (matriculation to graduation, accounting for transfers)

**Our students will leave the A&M System as responsible and engaged citizens prepared for successful careers in an increasingly global economy.**

8. Improvement in absolute persistence rates and graduation rates over time
9. Actual vs. expected persistence and graduation rates
10. Placement rates six months after graduation (including employment, graduate school enrollment, service placement)
11. Salaries at third and fifth years following graduation
12. Student Return on Investment

**The A&M System will increase its prominence by building a robust and targeted research portfolio.**

13. Total A&M System-wide research expenditures (\$)
14. Total volume of research activities across the A&M System
15. Number of National Academy members
16. Progress toward emerging research status

The A&M System will provide services that respond to the needs of the people of Texas and contribute to the strength of the state's economy.

17. Number of degrees granted in critical fields identified by the state
18. Number of agency contact hours
19. Number of services provided (e.g. diagnostic samples processed, fires fought, emergency rescues)

The A&M System, in adhering to the high standard of excellence and growth required in this strategic plan, will display prudent financial stewardship and sustainability.

20. Composite Financial Index
21. Reserve ratio
22. Administrative cost ratio
23. Return on investable assets
24. State appropriations/Full-time student equivalent
25. Tuition and fees/Full-time student equivalent
26. Expansion of donor base and overall funds raised

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### Process for Accountability

A review process will ensure accountability at all levels:

- The Board of Regents will hold the A&M System accountable to the strategic plan.
- The A&M System will leverage the existing annual programmatic budget review process to monitor progress against the strategic plan imperatives and measures of success and address any issues that arise.
- This process will also be used to facilitate the development of institutional-level growth plans and the synthesis of those plans into a systemwide understanding of growth and its implications.

The Board of Regents will establish a cadence for the review of progress against the measurable goals of this plan and institutional plans for growth. This process will contribute to a culture of accountability in which the A&M System is held responsible for the plan laid out here and will ensure the Board of Regents has the information needed to evaluate the A&M System progress over time.

	Process for Accountability Timeline				
	November <sup>1</sup>	December	January	February – March	April – May / July – August <sup>2</sup>
<b>Measurements for Success</b>	Member institutions prepare an annual update on measurements associated with the six imperatives	Member institutions report on metrics, submitting all measurements to the A&M System Offices	The A&M System Offices aggregate measures at the A&M System level and take note of any red flags that indicate a lack in progress	The A&M System Offices communicate with leadership of member institutions regarding any areas of concern. Institutional leadership will provide any relevant clarification for their reported metrics	The A&M System Offices provide the Board of Regents with systemwide update on progress of strategic plan during programmatic review session
<b>Growth Planning</b>	Each university will prepare a five-year operational plan. This will include a review of their enrollment growth targets and rationale for this projection, as well as the monetary and people investments needed to achieve the growth plan	The A&M System Offices and Chancellor review plans and provide any initial feedback for plan iteration	The A&M System Offices aggregate growth plan and inputs at a systemwide level, identifying any significant issues from the aggregation	The A&M System Offices provide any modification advice to campuses and address any significant issues. The A&M System Offices set contingency plans for missed growth targets and funding shortfalls	Finalized A&M System growth plan presented to the Board of Regents during programmatic review session

<sup>1</sup> Some metrics will rely on reporting from outside the A&M System and may not be available until later in the process.

<sup>2</sup> The Board of Regents’ review of progress should occur April - May during non-legislative years and July - August in legislative years, similar to the programmatic budget review cycle.



**The A&M System will develop incentives to encourage members to deliver on the goals of this plan**

Traditional funding mechanisms have encouraged A&M System members to act independently, particularly in the pursuit of research opportunities. In response, the A&M System will develop means to encourage collaboration among members, either by providing resources to support joint pursuits, or by providing vehicles that reduce the barriers for collaboration.

**The A&M System may integrate key goals of this plan into the performance management of A&M System leaders**

The Board of Regents will select the key metrics to be included in the evaluation of member institution leaders. Not all metrics tracked are appropriate for evaluation. The unique circumstance of each campus will be considered, and the improvement of key metrics over time is viewed as a better indicator of performance than an institution's performance relative to its A&M System peers.

**System Administration Responsibilities:**

- Facilitate academic and research collaboration across members
- Aggregate member growth plans and develop a systemwide view on financial sustainability
- Orchestrate reporting and accountability to the Board of Regents

**Member Institution Responsibilities:**

- Focus on carrying out education, service, and research imperatives
- Partner in A&M System efforts



THE TEXAS A&M  
UNIVERSITY SYSTEM

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## **Addendum**

## VI. ADDENDUM: THE STRATEGIC PLANNING PROCESS

The Texas A&M University System Board of Regents began the strategic planning process in December 2015 with the intention of setting A&M System strategic priorities for the next five years and establishing an active accountability process to ensure execution of those priorities. This plan was developed over a yearlong period, with the process led by the Board of Regents and with deep engagement of the A&M System administration and leadership from member institutions.

### Development of the Plan involved the following activities:

- An initial gathering of a fact base to assess the current state of The Texas A&M University System. The current state was considered in the context of the broader higher education landscape, in relation to institutional peers, and in conjunction with the needs of Texas. These internal data points and perspectives provided a comprehensive view of the A&M System to date in preparation for planning future goals.
- The strategic planning process began with the first Strategic Planning Committee Retreat in January to reaffirm the mission and explore potential areas of focus for the A&M System. This group included a 14-member Strategic Planning Committee (SPC), made up of the Board of Regents and institutional leaders, along with five A&M System Offices representatives.

#### **Board of Regents**

- Chairman Cliff Thomas
- Vice Chairman Elaine Mendoza
- Regent Phil Adams
- Regent Robert L. Albritton
- Regent Anthony G. Buzbee
- Regent Morris E. Foster
- Regent Bill Mahomes
- Regent Judy Morgan
- Regent Charles W. Schwartz
- Student Regent Alvaro Gabriel Pereira

#### **Institutional Leadership**

- Vice Chancellor M. Katherine Banks
- President Dan R. Jones, Texas A&M University-Commerce
- President Steven H. Tallant, Texas A&M University-Kingsville
- President Michael K. Young, Texas A&M University

#### **System Offices Representatives**

- Chancellor John Sharp
  - General Counsel Ray Bonilla
  - Vice Chancellor James R. Hallmark
  - Executive Vice Chancellor Billy Hamilton
  - Vice Chancellor Jon Mogford
- Over the course of the SPC Retreat in January 2016, a February 2016 Board workshop session that included the SPC, and a second SPC Retreat in March 2016, the SPC developed core principles, strategic imperatives, measurements for success, and an accountability process – the main components of the strategic plan.

- A&M System CEOs provided feedback on two iterations of the plan, resulting in changes to the document including the following:
  - Greater clarity on the role of agencies in the A&M System
  - Recognition of the diverse circumstances in which member institutions are operating, leading to a flexible plan that articulates aspirational goals and provides appropriate guidance, and also allows each member institution to respond to its own environment
  - Additional detail and refinements to the measures for success
- Finally, the SPC met again on April 28, 2016 during the Board of Regents workshop to review the final draft in preparation for approval at the November 2016 Board of Regents meeting.

### The plan is the product of thoughtful discussions and careful decisions:

- **Quality vs. Excellence**

Quality was initially proposed as a core principle of the A&M System. While “quality” is often thought of in terms of quality of inputs (e.g. caliber of incoming students and faculty), “excellence” focuses more on the absolute level of quality and also indicates a higher emphasis on the value gained by various stakeholders through their involvement with the A&M System, as well as the pursuit of reaching the A&M System’s full potential.

- **Growth and Access**

Enrollment growth is central to the land-grant mission of providing access to Texans, but rather than prescribing growth targets by campus, the SPC aims to guide growth by setting growth principles and establishing a process to implement growth across campuses. Through this process, campuses will plan their own growth targets and share their plans with the Board of Regents. A rigorous analysis and discussion of these plans should result in growth that is thoughtful, intentional, and productive for the A&M System.

### Strategic Plan metrics are designed to measure progress towards imperatives, while providing some flexibility for further specification:

*All qualified students will find a place in the A&M System and will have an array of pathways to pursue their ambitions and interests.*

1. **Yield of admitted applicants at the A&M System level**

Measuring yield of qualified applicants encourages member institutions to focus on recruiting all qualified students as capacity allows. Further, this measure would positively reflect A&M System efforts to coordinate placement of students across campuses.

2. **Share of total Texas postsecondary enrollment over time**

In order to best serve the state and fulfill the A&M System’s land-grant mission, the strategic plan aspires for the A&M System to grow its share of Texas high school graduates who enroll in college. The share of total Texas postsecondary enrollment over time will reveal how successful the A&M System is in communicating the value of an A&M System education to prospective students.

3. **Share of top 10% of Texas high school graduates who join the A&M System over time**

4. **Share of Texas high school graduates who join the A&M System that are in the top 10% in terms of SAT scores**

Recruiting top-quality students is an important element that will contribute to the overall excellence of the A&M System over time.

***The A&M System will remain affordable and accessible.***

**5. Ratio of student debt to median family income**

Affordability is best measured by the financial burden on students and their families to fund their education. Measuring the ratio of student debt to median income urges universities to manage both the cost of delivering the education and the financial aid strategy to minimize the debt level of students.

**6. Percentage of cohort designated as first generation students, underrepresented students, Pell grant recipients**

The SPC believes that continuing to serve a diverse population of students is a top priority for the A&M System, especially given the growing diversity of the state and our land-grant mission. Measuring the above characteristics of incoming cohorts over time will ensure that member universities continue to maintain a diverse student body that represents the underlying demographics of the state. Tracking this statistic will also be an important input to determining what resources should be dedicated to initiatives related to student success (academic success, retention, and graduation). As the diversity of the student body increases, the demand on student-related supports is likely to increase as well.

**7. Time-to-degree (matriculation to graduation, accounting for transfers)**

Reducing the time-to-degree for students reduces students' overall cost of acquiring a higher education degree, and can also be used as an indicator of the effectiveness of support services provided to students to enable them to graduate in a timely fashion. The SPC understands that this measure is affected by non-traditional and working students. This metric is intended to be considered in the context of the students that individual institutions serve and is not intended to create a disincentive to universities for serving higher need students.

***Our students will leave the A&M System as responsible and engaged citizens prepared for successful careers in an increasingly global economy.***

**8. Improvement in absolute persistence rates and graduation rates over time**

Persistence and graduation rates are widely used and recognized as indicators of educational quality. The SPC believes these are critical outcome measures that need to continue to be tracked.

**9. Actual vs. expected persistence and graduation rates**

In addition to measuring institution-specific persistence and graduation rates over time, there is also value in comparing the actual results to expected results. Expected retention and graduation rates can be calculated using regression analysis, with student demographics as some of the underlying variables, to demonstrate what a given member institution within the A&M System might achieve. This type of analysis would involve pulling in student demographic and outcomes data from other institutions, and would provide an additional, important data point for system and university leadership to evaluate individual university and overall A&M System performance. A positive difference between actual and expected outcomes would indicate that the institution created more value than expected with the resources it had at its disposal; a negative difference between actual and expected outcomes would indicate that the institution in question should perhaps take a closer look at the initiatives in place to support student outcome improvements.

**10. Placement rates six months after graduation (including employment, graduate school enrollment, service placements)**

Given the SPC's strong focus on outcomes rather than input measures, the student placement rate six months after graduation is an important metric for the A&M System. It measures the ability of the A&M System to prepare students for success post-graduation, with success defined as the students' ability to secure their next pursuit, whether that is a career, service, or educational (e.g. graduate school) placement. The career aspect, while certainly not the only definition of success, was top of mind for the SPC. Given the A&M System's land-grant mission, the A&M System aspires to create strong alignment between state (and also national and global) labor market needs, the A&M System's program offerings, and the content, critical thinking, and life skills that students acquire over the course of their education with the A&M System.

**11. Salaries at third and fifth years following graduation**

While the SPC believes that short-term measures of post-graduation success are important, longer-term indicators of success also need to be captured to determine whether the A&M System is indeed providing long-term value to its students. For this reason, measurement of starting salaries is not included as a key measure. Instead, the SPC considers salaries at the third and fifth years following graduation a better indicator of preparing students for a successful career path. State agencies have current initiatives to track salaries of graduates which should aid in the reporting of this data.

**12. Student Return on Investment**

With the intention of ensuring that a A&M System education is valuable to students, the SPC believes measuring student return on investment will not only estimate the economic return of education at the A&M System, but will also project the career-readiness of students who graduate from the A&M System. This will also be important information to share with prospective students (and their families) who are considering a range of higher education choices, both in Texas and beyond.

*The A&M System will increase its prominence by building a robust and targeted research portfolio.*

**13. Total A&M System-wide research expenditures (\$)**

After considering a number of measures of accountability for the A&M System's research efforts, the SPC agreed that A&M System-wide research expenditures is the primary metric for measuring the success of the A&M System in the area of research, following a virtuous cycle of "successful research begets successful research." This measure also acts as an incentive to grow research activity through collaboration across member institutions.

**14. Total volume of research activities across the A&M System**

Measuring the total number of unique research activities at member institutions will help to highlight and recognize all research across the A&M System, regardless of size.

**15. Number of National Academy members**

Given the importance of faculty to advancing research activity, measuring the number of National Academy members will encourage the A&M System to recruit renowned faculty in areas of A&M System strength.

**16. Progress toward emerging research status**

Eligibility for status as an emerging research university requires an institution to meet a number of criteria for expenditures, doctoral students, and undergraduate and graduate programs. The SPC recognizes that attaining this top-tier designation is an aspirational goal for the A&M System's universities, but believes any intermediate progress towards the criteria is a step in the right direction.

***The A&M System will provide services that respond to the needs of the people of Texas and contribute to the strength of the state's economy.***

**17. Number of degrees granted in critical fields identified by the state**

Given the mission of the A&M System to serve the state, the A&M System has a role to play in educating students in disciplines which are experiencing a shortage of qualified workers. The Texas Higher Education Coordinating Board identifies critical fields necessary for serving the needs of the state, and includes the number of degrees awarded in the fields as an appropriate success measure.

**18. Number of agency contact hours**

Given the diverse activities at the A&M System agencies, contact hours – a measure of the time agencies spend serving their constituents – is a broad metric meant to capture the level of activities at service-oriented agencies.

**19. Number of services provided (e.g. diagnostic samples processed, fires fought, emergency rescues)**

While contact hours and research dollars were agreed upon as appropriate metrics for a majority of the agencies, some agencies did not feel these measures captured their key outputs. As such, a volume measure of services provided as opposed to contact hours provides a more appropriate measure of the expanding efforts of some agencies.

***The A&M System, in adhering to the high standard of excellence and growth required in this strategic plan, will display prudent financial stewardship and sustainability.***

*The A&M System Offices selected the following financial sustainability measures as the simplest set of metrics for members to report while still providing a holistic view of financial health. In addition to the monitoring of financial health of members, this reporting will assist the A&M System Offices in developing an aggregate assessment of financial health at the A&M System level.*

**20. Composite Financial Index**

**21. Reserve ratio**

**22. Administrative cost ratio**

**23. Return on investable assets**

**24. State appropriations/Full-time student equivalent**

**25. Tuition and fees/ Full-time student equivalent**

**26. Expansion of donor base and overall funds raised**