

Monitoring Report on Strategic Planning Malone University, Canton, Ohio

**Submitted to
The Higher Learning Commission
Staff Liaison: Karen Solomon
November 2014**

Following a comprehensive HLC accreditation review visit in September 2012, the visiting team recommended that Malone University submit (1) **a progress report** outlining a timeline and work plan for developing a comprehensive strategic plan, followed by (2) **a monitoring report** with submission of the final strategic plan and a description of the ongoing planning process at the university. The progress report was submitted, reviewed, and approved by HLC in November 2013. This monitoring report outlines additional development and implementation of our comprehensive strategic plan.

This monitoring report includes the following:

1. A brief description of the institutional process that led to the final plan,
2. Copy of the plan including Thriving Scorecard template, objectives, initiatives, measures, and “briefing book,”
3. A detailed description of an ongoing planning process that will continue to provide a framework for institutional growth and development into the future, and
4. Evidence that the plan fulfills Core Component 2c, (“The organization realistically prepares for a future shaped by multiple societal and economic trends.”) and Core Component 2d (“All levels of planning align with the

organization's mission, thereby enhancing its capacity to fulfill that mission.").

General Background and Overall Institutional Planning Process

Malone University's "Progress Report on Strategic Planning" was submitted to HLC in November 2013 following the unanimous approval of the Malone University Board of Trustees' review and adoption of the strategic planning framework. The overall institutional process that led to the final plan is fully outlined in the November 2013 Progress Report.

This Monitoring Report will focus mostly on processes completed since that submission.

In brief, the initial planning process included the following:

- Input from newly appointed president, Dr. David King, on preliminary goals to be considered during the planning process
- Campus-wide input into the planning process – through an October 2012 campus event with the entire faculty and staff – facilitated by our higher education consulting firm and establishment of a website and blog to allow additional and ongoing input from the broader constituent community
- Development of a strategic planning steering committee that addressed (a) mission and vision, (b) SWOT analysis, and (c) preliminary goals and priorities
- Securing outside assistance from CREDO Higher Education Consulting on extensive development of a **Thriving Scorecard** for implementation and

evaluation of strategic planning initiatives through a strategy map identifying overarching themes, prioritized initiatives and specific measures of success.

At their October 18, 2013 meetings, sub-committees of the Board of Trustees reviewed the strategic planning framework (i.e., use of the Thriving Scorecard model), the objectives of the plan, and the initiatives identified in the plan. At their October 19, 2013 plenary session, the Board of Trustees discussed and unanimously approved the strategic plan, affirmed the themes and objectives, reviewed the initiatives, and recommended certain priorities as immediate strategic needs.

A university-wide Community Forum was held October 29, 2013 to review the Board of Trustees action including recommendations proceeding from the strategic planning documents. On November 22, 2013 a university-wide Town Hall meeting, facilitated by the president and provost, addressed issues associated with implementation of the plan with associated initiatives and measures, and structures for monitoring progress.

The Strategic Plan Framework and Content

The **Thriving Scorecard** strategy map [see Appendix A] is designed to show cause and affect linkages. In development of the scorecard, the campus focused on four **Key Frameworks for Success** to create alignment and to represent the symbiotic relationships between processes, resources, people, and systems.

In the Thriving Scorecard strategy map the vertical axis visually addresses these four key frameworks by emphasizing:

1. Organizational capacity

2. Internal processes
3. Financial resources, and
4. Student stakeholders.

The horizontal axis identifies the three key themes of our strategic plan:

Visibility, Viability, and Vibrancy. Each theme includes four specific objectives correlating to the framework of the vertical axis outlined above for a total of twelve objectives.

The four objectives Under Visibility are: (1) clarify brand promise, (2) develop marketing focus, (3) invest in marketing expertise, and (4) increase awareness. The four objectives under Viability are: (1) build strategic financial understanding, (2) strengthen infrastructure, (3) optimize return on investment, and (4) diversity and increase revenue. The four objectives included under Vibrancy are: (1) develop a student-centered culture, (2) maximize data-driven decisions, (3) align resources with priorities, and (4) advance learning outcomes.

Each theme identifies between eight to fifteen specific initiatives with associated measures and projected budget allocations correlating to the twelve objectives articulated in the plan. [See Appendix B] for Master List of Initiatives, Measures, and Costs.

In conjunction with our strategic planning consultant, proprietary software tracks development and implementation of identified initiatives and measures. Data is collected from various campus offices, collated and entered into the software system either by the Office of the Provost or by the university Controller (an employee of the University Finance Office). To track progress, data is analyzed and

converted into visual dashboard indicators. A “Briefing Book” identifies the master list of initiatives and measures and communicates at various levels depending on the level of involvement of the constituent party. For example, the Board of Trustees at the highest level of oversight and the Vice Presidents and Deans at the daily operational level. [See Appendix C **Briefing Book** for specifics].

Ongoing Planning Process – Campus-Wide Efforts

Through the months of December 2013 through January 2014 the president held sessions with each individual college and school (i.e. College of Theology, Arts and Sciences; The School of Nursing and Health Sciences; The School of Business and Leadership; and The School of Education and Human Development) to discuss the role of the four schools in the implementation of the strategic plan.

Three additional on-site meetings in 2014 (January 7, March 27, and August 28) with our strategic planning consultant focused on (a) updating the Thriving Scorecard template, (b) working with “theme teams” to further develop initiatives and measurements for evaluating effective implementation of each initiative, (c) training university staff in use of the Thriving Scorecard software system, and (d) development of a set of “dashboard indicators” for visualizing progress and keeping the university on track in fulfilling identified initiatives.

Following the March 27 meeting with our planning consultant it was agreed that the University Collegium (i.e., President’s Cabinet) would replace the Strategic Planning Steering Committee to monitor the continued progress toward identified measures and implementation of the Board-approved strategic initiatives.

Strategic Plan Implementation and Connection to Budget Process

Beginning with the 2014-2015 fiscal budgets, the University altered its budget submission process and hiring procedures to include direct correlation, verification, and alignment with the Strategic Plan. Beginning with budget requests and reallocations submitted in spring 2014 (for inclusion in the 2014-15 budget), every line item in the budget includes a drop-down box connected to one of the three planning themes: **Visibility**, **Viability**, or **Vibrancy**.

Every selected theme then opens a drop-down box connected to and reinforcing the specific initiatives in the strategic plan. [See Appendix D for sample screen shot and close-up view of drop-down box.] Budget managers must align expense requests with the associated initiative. Requests for budgets adjustments or reallocation of funds are reviewed and approved depending upon alignment with targeted initiatives.

Personnel decisions also must align with strategic goals and priorities. The University recently updated its HR Action Form to include specific connections to the University strategic plan. The HR Action Form is used when requesting new hires or reclassifying current employees. [See Appendix E for sample HR Action Form and its verification of connection to the strategic plan].

A Few Specific Examples

Here are some specific examples of how the Strategic Plan is being implemented and realized across the campus. Please note: This is not a

comprehensive summary, but a brief overview of ways that different campus constituencies are responding to the strategies and objectives outlined in the **Thriving Scorecard** of the Strategy Map.

Admissions, Marketing, and Advancement

In alignment with the strategic theme of **Visibility**, The Vice President of Enrollment along with the Director of Admissions initiated new strategies for recruitment, off-campus visits, scholarship programs, and strategic list purchases.

In Summer 2014, in response to the critical need to reinforce the Strategic Theme of **Visibility**, the University hired a new Vice President of Marketing and Public Relations charged with increasing awareness, improving public relations, and assisting enrollment offices, academic offices, and advancement offices with messaging, campaign development, and program marketing and implementation.

To assist with identified strategic initiatives under **Viability** and identified needs for fundraising and Board directives for increasing non-tuition revenues, The Vice President for Advancement developed a preliminary “case for support” designed to precede a major capital campaign and instill a “culture of philanthropy” among university supporters.

Curriculum and Academic Affairs

The Academic Affairs Office in collaboration with the Faculty Senate, the Undergraduate Academic Policy Committee, and the Graduate Academic Policy Committee, implemented measures to analyze and evaluate efficiencies, sustainability, and viability in academic programming and to propose (a) reductions in areas deemed unsustainable within the current environmental context, (b)

revisions to programs with high cost and/or other inefficiencies, (c) creation of synergistic academic structures, (d) identification of opportunities for program development, and (e) other related efficiency measures.

Reinforcing objectives of both **Viability** and **Vibrancy** led to submission of an “Academic Cost Containment Proposal” with four parts:

- Part 1 – Program Reductions with implementation beginning fall 2015
- Part 2 – Program Revisions and Further Analysis with implementation beginning fall 2015
- Part 3 – Program Review and Revisions to General Education for implementation beginning fall 2015 with completion by fall 2016
- Part 4 – Other cost savings measures, efficiencies, and program development opportunities with implementation to begin fall 2016

The “Academic Cost Containment Proposal” was reviewed by the faculty through our faculty-wide curriculum review process and public discussion board and voted upon affirmatively with an 80% approval at the April 28, 2014 Faculty Business Meeting.

A review of General Education programming conducted with collaboration between, the Academic Affairs Office, the Faculty Senate, the General Education Committee, and the Undergraduate Academic Policy Committee, commenced in May 2014 with a proposal submitted to the full faculty for vote on October 21, 2014. The faculty, by a 71% majority, approved a revised and streamlined general education program to go into effect with the fall 2015 academic term.

Institutional Research and Assessment

To support strategic initiatives to “maximize data-driven decisions” the Office of Institutional Research and Assessment distributed the Student Satisfaction Inventory (SSI) to assess the effectiveness of strategic initiative to “develop a student-centered culture” and the National Survey of Student engagement (NSSE) to “advance learning outcomes.” In addition, the General Education Committee voted to begin using the Collegiate Learning Assessment (CLA) instrument to gather data on student learning outcomes and to fulfill the initiative to “expand focus of assessment initiatives to include benchmarks focusing on comparative data with peer and aspirational institutions while integrating nationally-normed assessment tools.”

Our Retention Task Force implemented a number of initiatives designed to “advance learning outcomes” and to retain undergraduate, graduate and non-traditional students.

Athletics, Student Development, and Spiritual Formation

Concurrent with these initiatives, the Student Life office along with the Athletic Department reviewed costs and impact of athletic programming and moved to eliminate two intercollegiate sports with their associated staff and programming costs. Several campus spaces were renovated to enrich student services and to provide opportunities for social interaction.

In line with our theme of **Vibrancy**, the Office of Spiritual Formation implemented new structures and programming to “enhance opportunities for students to engage in spiritual development and to learn about faith integration.”

Board of Trustee Response and Monitoring

In alignment with the initiatives outlined in the Strategic Plan and in response to immediate fiscal challenges, the Board of Trustees, at their February 2014 meetings developed a set of six “directives” to guide and support executive leadership in the implementation of strategic planning goals.

These Board of Trustees directives are designed to position the University to weather current economic and enrollment uncertainties and to build capacity for future institutional development in alignment with the strategic plan, the University mission, foundational principles, and educational goals. These directives were informed by specific economic, demographic, and geographic issues precipitated by declining high school graduation rates in the Midwest and Northeast (and especially in Ohio), public uncertainty about higher education need and value, and highly public criticisms of private college education resulting in steep declines in Moody ratings.

In alignment with the Strategic Plan, the Board of Trustee directives include:

1. Measures to reduce tuition dependency and to increase other revenue streams.
2. Implementation of a “Program Launch and Implementation Task Force” to support program development processes and marketing new programs.
3. Steps to reduce overall cost of instruction and sustainable and manageable targets for student-to-faculty ratio.
4. Changes to General Education programming designed to reduce costs, maintain quality and desired outcomes of the University’s Educational

Goals, and implementation of ongoing cycles of assessment and improvement.

5. Increases in non-tuition revenue through summer camps, conferences, and outsourcing/partnerships.
6. Reductions in non-academic and academic programs and the identification of high market-value programs to stimulate *Visibility* and enrollment growth.

[See Appendix F for the Board of Trustee Directives and associated timelines for each directive.]

University Leadership and Strategic Planning Oversight

In Fall 2014, the University Collegium (i.e., President's Cabinet), along with our planning consultant, and in discussions with the Executive Committee of the Board of Trustees, developed a set of "Dashboard Indicators" to reinforce and to visualize progress related to the Strategic Plan. [See Appendix G for a complete grid of metrics included in the Dashboard Indicators].

Identified metrics for measuring initiatives are divided into three constituency categories: (1) Board of Trustees, (2) VPs and Deans, and (3) the Public in accordance with the level of public disclosure, analysis, and/or oversight needed by each constituent group. We are currently in the process of redesigning our strategic planning website in order to better visualize the progress and implementation of each objective. We expect an updated website to be completed in

early 2015. A few sample screen shots of dashboard visuals are included in [Appendix H].

The President has placed a high priority on following the Strategic Plan. Every Board of Trustee meeting since October 2012 has included specific review and updates to the Strategic Plan. Regular meetings of the Collegium (President's Cabinet) include at least some specific focus on strategic planning objectives and initiatives. Yearly goals from each Vice President must align with strategic planning initiatives. [See Appendix I for President and VP Goals].

Quarterly "Community Forum" events highlight recent implementations of the strategic plan. Budget reallocation requests and personnel decisions must align with and reinforce elements of the plan. The university Provost routinely reviews strategic initiatives with the deans of each school. In consultation with chairs and directors, the Deans of schools review progress of identified initiatives within their respective school.

In the initial phases of development, the strategic planning steering committee identified more than 100 potential initiatives that were then reduced to about three-dozen top priorities for immediate action. We anticipate a continued relationship with our strategic planning consultant to update, revise, and expand initiatives as necessary. As individual initiatives are completed, we will work with faculty policy committees, faculty senate representatives, program directors and chairs, deans and administrative offices, along with our planning consultant, to update the plan. The provost, vice presidents and deans, (executive leaders

comprising the university Collegium) will continue to monitor implementation, progress, and completion.

Summary and Conclusion

In sum, we feel confident that Malone University demonstrates compliance with all HLC criteria and has demonstrated its resolve to respond to concerns about comprehensive and ongoing strategic planning and university strength. Malone University's strategic plan is designed to align with the university mission and demonstrates the capacity to fulfill that mission.

Our plan prepares the University to respond appropriately, aggressively, and realistically to societal and economic trends and other factors. The University has carefully designed the strategic plan to focus on a comprehensive university-wide and integrated planning process that includes (1) continued involvement of all vested stakeholders, (2) public dissemination of progress through clear measures and visible responses to each initiative, and (3) development of objectives, initiatives, measures, and priorities which will carry the University confidently into the future.

Strategy Map

October 2013



	OBJECTIVE	Priority
VISIBILITY: Institutional Identity and Reputation. Building our reputation.	Clarify Brand Promise	
	Clarify Brand Promise	
VISIBILITY: Institutional Identity and Reputation. Building our reputation.	Develop Marketing Focus	A
VISIBILITY: Institutional Identity and Reputation. Building our reputation.	Invest in Marketing Resources	
	Invest in Marketing Resources	
VISIBILITY: Institutional Identity and Reputation. Building our reputation.	Increase Awareness	
VISIBILITY: Institutional Identity and Reputation. Building our reputation.	Increase Awareness	
	Increase Awareness	
VISIBILITY: Institutional Identity and Reputation. Building our reputation.	Diversify and increase revenue	A
VIABILITY: Financial Strength. Improving Our Margins		
VIABILITY: Financial Strength. Improving Our Margins	Diversify and increase revenue	A
VIABILITY: Financial Strength. Improving Our Margins	Diversify and increase revenue	A
VIABILITY: Financial Strength. Improving Our Margins	Diversify and increase revenue	

VIABILITY:Financial Strength. Improving Our Margins	Diversify and increase revenue	
VIABILITY:Financial Strength. Improving Our Margins	Optimize return on investment	A
VIABILITY:Financial Strength. Improving Our Margins	Optimize return on investment	A
VIABILITY:Financial Strength. Improving Our Margins	Optimize return on investment	A
VIABILITY:Financial Strength. Improving Our Margins	Optimize return on investment	
VIABILITY:Financial Strength. Improving Our Margins	Strengthen infrastructure	
VIABILITY:Financial Strength. Improving Our Margins	Strengthen infrastructure	A
VIABILITY:Financial Strength. Improving Our Margins	Strengthen infrastructure	
VIABILITY:Financial Strength. Improving Our Margins	Strengthen infrastructure	
VIABILITY:Financial Strength. Improving Our Margins	Strengthen infrastructure	
VIABILITY:Financial Strength. Improving Our Margins	Strengthen infrastructure	
VIABILITY:Financial Strength. Improving Our Margins	Build strategic financial understanding	

VIBRANCY: Student Learning Experience. Transforming Our Students	Advance learning outcomes	
VIBRANCY: Student Learning Experience. Transforming Our Students	Advance learning outcomes	
VIBRANCY: Student Learning Experience. Transforming Our Students	Align resources with priorities	
VIBRANCY: Student Learning Experience. Transforming Our Students	Align resources with priorities	
VIBRANCY: Student Learning Experience. Transforming Our Students	Maximize data-driven decisions	
VIBRANCY: Student Learning Experience. Transforming Our Students	Maximize data-driven decisions	
VIBRANCY: Student Learning Experience. Transforming Our Students	Maximize data-driven decisions	
VIBRANCY: Student Learning Experience. Transforming Our Students	Building student-centered culture	A
VIBRANCY: Student Learning Experience. Transforming Our Students	Building student-centered culture	A
VIBRANCY: Student Learning Experience. Transforming Our Students	Building student-centered culture	A

INITIATIVE/PROJECT	MEASURE
Working with Simpson Scarborough to better identify Malone's Brand	Level of brand promise clarity
Brand Identity rollout	Brand Identity Acceptance Survey (BIAS)
Develop a strategic university marketing plan	Marketing plan completion
Monthly and annual review of marketing expenditures, associated outcomes, new program marketing analysis, and costs per tool/strategy	Marketing Budget year-to-date allocation (% spent YTD and effectiveness of expenditure)
Evaluation of Marketing Effectiveness	Compare expenditures to industry standards and identified peer groups
Youth group and high school recruiting	Youth group inquiries, high school inquiries
Scholarship student recruitment	Scholarship student inquiries
List purchasing	Lists purchased; measure size of the inquiry pool by source of recruitment (youth group, faculty/staff, Christian high school, ACT scores, etc.)
Improve strategies for recruiting and retaining undergraduate, graduate and non-traditional students, with various modes of delivery to increase net revenue	Increase in enrollment (undergrad X%; Grad X%; Degree Completion X% and retention rate by X%) by Fiscal Year 2018
Develop plan to review and project net tuition dollars for each program; analyze the contribution margins and review profitability	Net revenue increase > increase in operating expenses over the next three years
Improve fundraising	105% Annual Fund achievement; 5% over industry standard for alumni giving; 100% BOT giving participation; Increase aggregate BOT giving 10% per year
Create a plan/document with descriptions and definitions inline with industry standards (private HE)	Definition of and increase in major gifts

Decrease reliance on tuition revenue	Decrease from 83% tuition dependence to 75% by 2018; % increase in revenue from events and auxiliary services
Implement at least one new market-driven and one revised program or major each year	Accomplished 20% ROI - Revenue less the start up operating costs (e.g. faculty member, marketing, support) by year 2
Develop an appropriate plan for identifying unproductive or obsolete programs (philosophical, fiscal, mission-related concerns)	Formally close unproductive programs
Determine and develop initiatives that retain students and increase completion rates	Improved graduation rate (% students graduate in less than 5 years; % students graduate in 4 years); % increase retention rate
Capacity study with reference to the current faculty, staff, physical classroom, and distance education resources	% classroom usage; analyze faculty to student ratio (undergraduate, graduate, degree completion)
Develop a plan for maximizing facilities, technology, personnel, and systemic structures	% implementation of campus enhancement plan; analysis of personnel costs per student; IT costs per student; space utilization analysis
Develop a plan for creating physical places for enriched opportunities for student interaction	% implementation of campus enhancement plan; Improvement in Student Satisfactory Inventory (SSI) gap scores
Develop a plan to attract and retain residential students	90% dormitory occupancy rate
Develop a clear systematic plan to create the foundation for data driven decision-making.	Pursue options for data management and analytics warehouse for information sharing across campus
Train staff on use of ERP system	% staff trained on the use of the ERP system (Jenzabar and other); increase % participation in Finishline; increase % participation in employee training (e.g. IT summer courses)
Annual development and use of assessment reports	% implementation of recommended results from departmental Assessment Reports; Quarterly follow up from Assessment Implementation Committee on the review and implementation of the AIRs to the University Collegium
Ensure a clear understanding of financial priorities and revenue margins among faculty, staff, and administration: development, retention, enrollment, budget. Choose key rubrics and make the scorecard visible	Reduction in percentage of budget managers over budget at month end. Budget reconciliation project (BO monthly); % participation in employee giving; % employee participation in lead generation for advancement; % of website hits on financial scorecard;

Students will successfully complete their chosen course of study prepared to live, work and serve in a culturally diverse and technologically evolving society	Review of annual Assessment Reports; Learning Impact Reports - % of reports turned in; % increase in retention and graduation; participation in FinishLine, outcomes; Alumni survey - # alumni employed in major-related fields and alumni satisfaction assessment Spiritual Development Survey; CCCU common questions on SSI; institution specific questions on SSI
Enhance opportunities for students to engage in spiritual development and to learn about faith integration	
Implement new and strengthen existing academic and support programs that embody and leverage Malone's distinctive institutional strengths in ways that respond to student need and the evolving higher education environment	% of capital budget requests tied to Learning Impact Reports and Program Assessment Impact Reports; meeting minutes will reflect data-driven decision making and evidence of incorporation into processes
Create and implement professional development activities for all categories of employees	Roster of events, monitor participation and representation; participant evaluation for events
Reinforce a commitment to student-focused service including an effective feedback loop to gauge customer service perceptions	Student Satisfaction Inventory (SSI) selected questions, mean and gap score (compare to peer group); National Survey of Student Engagement (NSSE)
Establish assessment benchmarks	Assessment reports; Department meeting minutes - will reflect data-driven decision making; evidence of incorporation into processes implementation of CLA inventory
Provide opportunities for cross-campus interactions, discussions about best practices, policy development, assessment, mission, and strategic planning	# and variety of opportunities listed on campus schedule of events; create an infrastructure that includes established processes for dialogue to occur on topics related to components of the strategic plan
Increase the number and types of opportunities for student involvement in active and applied learning on and off campus (i.e., global studies, service-learning, internships, cross-cultural engagement programs)	# of on and off campus events and opportunities; % increase in student participation in active learning opportunities (e.g. wilderness trips, service-learning, global education, cooperative learning, internships)
Enhance programs and activities that prepare students for transition into post-college life, particularly in the areas of vocation and church involvement	Alumni surveys
Develop strategies and initiatives to increase campus diversity and multicultural involvement	# of racially and ethnically diverse minorities represented in employees and students

DESCRIPTION	START DATE	END DATE
Simpson Scarborough brand features; Using the research to help Malone better understand its brand; agree upon and embrace our identity and the commitments we make to our constituents;	spring 2013	12/31/2013
Campus Events that generate awareness of and enthusiasm about Malone's brand Identity	1/15/2014	8/1/2015
Creating a marketing plan with associated outcomes, costs, etc. Create a culture in which all university processes enhance our identity and commitments; Analyzing the allocation of marketing budget funds	10/11/2013	2/1/2014
Allocate resources sufficient to convey our identity and commitments to external constituents	10/11/2013	ongoing
Monitor the amount of money spent for Malone to pursue and get new students as well as money spent per dollar raised in advancement	10/11/2013	ongoing
Improve strategies for recruitment: Youth group visits, Christian high schools	9/1/2013	ongoing
Improve strategies for recruitment: Faculty/staff/trustee scholarship program; Giving each faculty, staff and trustee member \$1000 to use on any incoming 2014 student	9/1/2013	12/31/2013
Improve strategies for recruitment: Strategic list purchase initiative; Purchasing names from sources that more greatly connect with Malone's mission (e.g. NRCCUA Christian High Schools, Christian Connector) and "good fit" data	9/24/2013	ongoing
	started	6/30/2018
Net tuition revenue study	started	6/30/2017
Increase the annual fund, increase reserves, and grow endowment through aggressive fundraising, alumni involvement, and board action	7/1/2014	6/30/2018
	10/11/2013	2/28/2014

Decrease the reliance on tuition revenue through other revenue opportunities such as facility rentals, dormitory maximization, academic and sports camps, speakers' bureau, events, auxiliary services	started	6/30/2018
Determine key and leading programs that benefit the community, respond to the market's needs, while offering optimal return on investment. Develop plan by fall 2014 to include new faculty hire, marketing strategies, program resources, etc. Target new program start by fall 2015	6/1/2014	ongoing
	10/11/2013	ongoing
	started	ongoing
	1/1/2014	
	6/1/2014	6/30/2018
Dedicate at least 20% of annual capital budget to "enhancement plan" project(s)	6/1/2014	6/30/2018
Policy changes and other incentives		
	11/1/2013	ongoing
Cost includes software, training, maintenance		
	7/1/2014	ongoing
	7/1/2014	ongoing

Students will discover their own ways of investing and actively participating in Malone's thriving campus community. Students will manifest holistic growth that integrates intellectual, social, and spiritual development	10/1/2013	ongoing
		ongoing
Resources will be allocated to support new and existing initiatives that sustain the institution and further its mission	9/1/2014	ongoing
	9/1/2014	ongoing
Decisions in all areas of Malone's programming and institutional life will prioritize student outcomes and respond to feedback, data, and assessment; Programming and campus culture will be developed and implemented in ways that students feel welcome and encouraged to partner with Malone as active participants in their own learning, growth, and development Expand focus of assessment initiatives to include benchmarks focusing on comparative data with peer and aspirational institutions while integrating nationally-normed assessment tools	10/1/2013	ongoing
	2/1/2014	ongoing
	1/1/2014	9/30/2014
Programming and campus culture will be developed and implemented in ways that students feel welcome and encouraged to partner with Malone as active participants in their own learning, growth, and development	2/1/2014	ongoing
		ongoing
Attention to applicant pool, job posting, and recruitment strategies; build specific connections with local community, civic, industry, and education networks	in process	ongoing

COST (one year)	COST (completion)	FUNDING SOURCE
\$ 95,000.00		Current Budget 2013-2014
\$ 10,000.00		Budget 2014-2016
		Current Budget 2013-2014
\$ 42,000.00		Budget 2014-2016
\$ 1,500,000.00		Current Budget 2013-2014
\$ -		
\$ 10,000.00		Current Budget 2013-2014
\$ 25,000.00		Current Budget 2013-2014
\$ 25,000.00		Current Budget 2013-2014
\$ 150,000.00	\$ 750,000.00	Additional \$150,000 each year
\$ 7,500.00		Current Budget 2013-2014
\$ 225,000.00		Current Budget 2013-2014
\$ 5,000.00		2014-2015

\$	35,000.00	2014-2015
\$	150,000.00	Additional \$150,000 each year
\$	55,000.00	Additional \$30,000 each year
\$	50,000.00	Additional \$50,000 each year
\$	2,500.00	Reallocation of budget
\$	250,000.00	\$1,200,000 Reallocation of curent yearly capital budget
\$	5,000.00	
\$	1,250,000.00	Capital purchase designation
\$	25,000.00	Increase each year
\$	5,000.00	
\$	5,000.00	

\$	8,000.00	Current budget
\$	5,000.00	
\$	85,000.00	Capital purchase designation; Budget 2014-2016
\$	16,000.00	Increase yearly budgets
\$	5,700.00	
\$	10,800.00	
\$	10,000.00	
\$	48,000.00	Increase each year
\$	2,400.00	
\$	16,500.00	Increase yearly budget

RESPONSIBLE PARTY

VP Enrollment; President's Marketing Team

VP Enrollment, President's Marketing Team

President's Marketing Team

VP Enrollment

President's Marketing Team

VP Enrollment

Financial Aid, Enrollment

VP Enrollment

Enrollment vice president; collegium; retention
task force

VP Finance; collegium

VP Advancement; president

VP Advancement; president

Deans, VP Finance; collegium; Director of Even

Deans; VP Academic

Deans; VP Academic

Deans; VP Academic

VP Academic/VP Finance; collegium

VP Finance, Colegium; Student Development; (

VP Finance, Colegium; Student Development; (

IT Office

IT Office

Office of Institutional Effectiveness and
Assessment

VP Finance/VP Advancement/IT

AIC (Charles; Chairs/Directors); CSS (Patty Little); OIEA (Charles and Karen)

Director of Spiritual Formation; OIEA

VP Finance, Collegium, Deans, OIEA

Human Resources; IT; Deans and Directors

Office of Institutional Effectiveness and Assessment; annual review and bi-annual comparison with peer group; departments

Office of Institutional Effectiveness and Assessment; annual review and bi-annual comparison with peer group; departments/directors, deans

Collegium
Office of Institutional Effectiveness and Assessment; Bi-annually comparison with peer group; CCCE (J Harris); CSS; departments/directors, deans

Alumni Relations

Office of Multicultural Services;VP Enrollment; Director of Human Resources; Deans - faculty hiring process; Diversity and Inclusion Committee

NOTES

Measure: A survey of full-time faculty and staff; updated bi-monthly

its

Additional budget start up, anticipated 20 students per major

Dedicate at lest 20% of annual capital budget to "enhancement plan" project(s)

Dedicate at lest 20% of annual capital budget to "enhancement plan" project(s)

Additional cost ofr maintenance and training

Invest in new initiatives and programs

Structures, student life

Element	Summary Views	Detail Views
Objectives	<ul style="list-style-type: none"> • Visibility Theme at a Glance • Vibrancy Theme at a Glance • Viability Theme at a Glance 	
Measures	<ul style="list-style-type: none"> • Viability Measures - Monthly View • Visibility Measures - Monthly View • Vibrancy Measures - Monthly View • Measures - Provost • Measures - VP/Advancement • Measures - VP/Finance • Measures - VP/Student Affairs • Measures - Full Details 	
Initiatives	<ul style="list-style-type: none"> • Initiatives - Provost • Initiatives - VP/Finance • Initiatives - VP/Student Affairs • Initiatives - VP/Advancement 	

Credo - Malone University Cabinet Briefing Book (Feb-14)

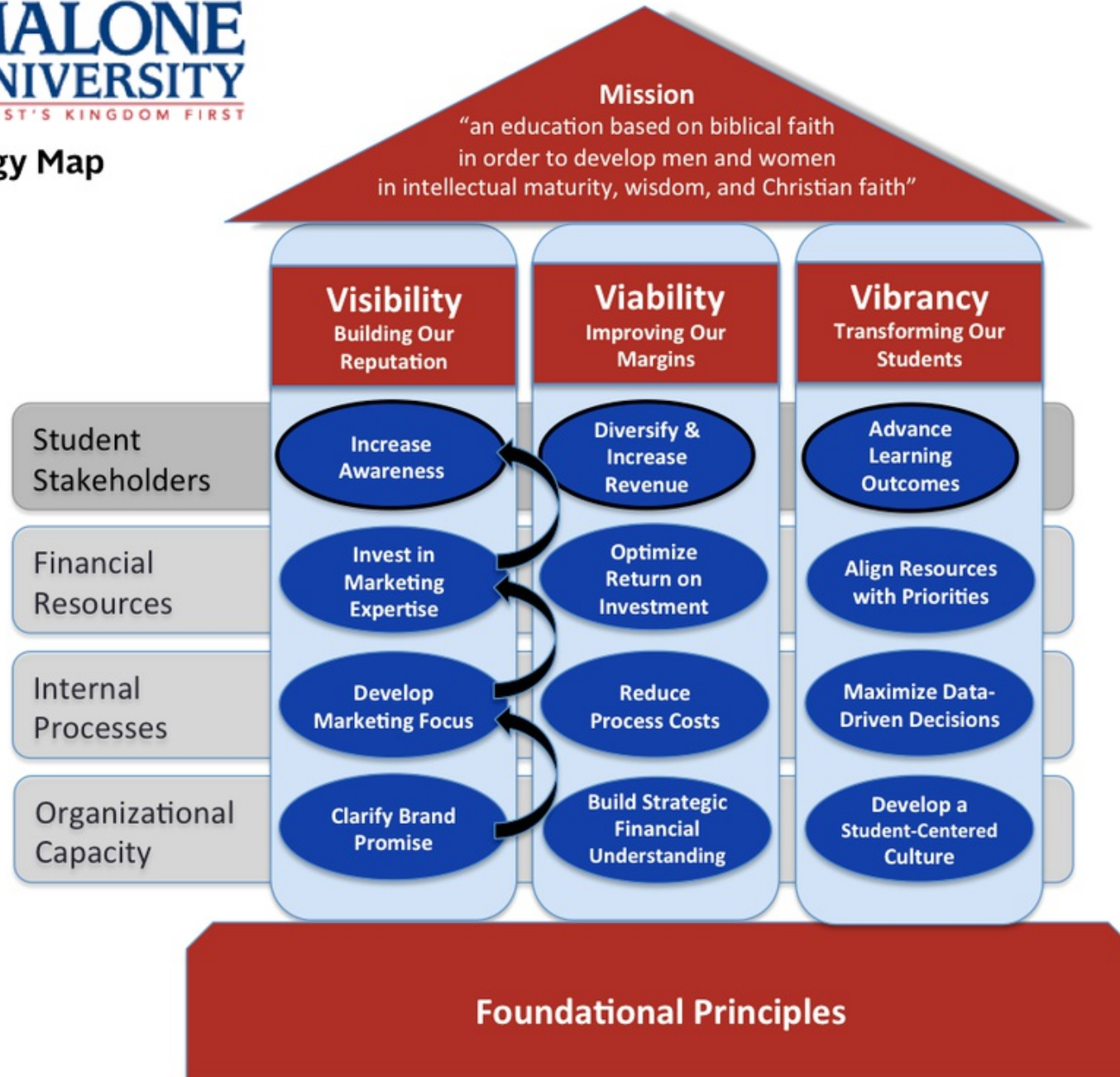
Credo - Malone University














Malone University

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Strategy Map



Objective	Measure	Initiative
 Increase Awareness	 Traditional Undergraduate Inquiries	
	 Traditional Undergraduate Applications	
	 Traditional Undergraduate Admits	
	 Traditional Undergraduate Deposits	
	 Total Undergraduate Enrollment	
	 Total Degree Completion Enrollment	
	 Total Graduate Enrollment	
	 Total University Enrollment	
 Invest in Marketing Resources		 Redesign Website
 Develop Market Focus		
 Clarify Brand Promise		

Objective	Measure	Initiative
<div><div></div>Advance Learning Outcomes</div>		
<div><div></div>Align Resources with Priorities</div>		
<div><div></div>Maximize Data-Driven Decisions</div>	<div><div></div>Curricular Governance Process</div>	
	<div><div></div>Student Development Impact Reports</div>	
<div><div></div>Develop a Student-Centered Culture</div>	<div><div></div>SSI Portions</div>	
	<div><div></div>Student Participation</div>	

Objective	Measure	Initiative
<div> <div></div> Diversify & Increase Revenue </div>	<div> <div></div> Total YTD Annual Unrestricted Giving </div>	<div> <div></div> Increase Board Giving </div>
	<div> <div></div> Total YTD Giving </div>	<div> <div></div> Increase conference and camping revenue </div>
	<div> <div></div> % of Non-tuition Revenue </div>	<div> <div></div> Recruiting Strategies </div>
	<div> <div></div> Net Revenue </div>	<div> <div></div> Study Net Tuition by Program </div>
	<div> <div></div> Total Tuition and Fees </div>	<div> <div></div> Increase Annual Fund </div>
	<div> <div></div> Total Other Revenue </div>	<div> <div></div> Increase Endowment </div>
	<div> <div></div> % Total Other Revenue </div>	<div> <div></div> Increase Major Gifts </div>
	<div> <div></div> Net Tuition Revenue (% of Total Revenue) </div>	
<div> <div></div> Optimize Return on Investment </div>	<div> <div></div> Close Programs </div>	<div> <div></div> Start New Academic Programs </div>
	<div> <div></div> Graduation Rates </div>	<div> <div></div> Identify Academic Programs to Close </div>
	<div> <div></div> New and Revised Programs </div>	<div> <div></div> Study of Academic Efficiency </div>
	<div> <div></div> Operational Revenue </div>	
	<div> <div></div> Operational Expense </div>	
	<div> <div></div> Revenue vs Expense </div>	
	<div> <div></div> Regular Degree Completion Courses with 10 or more students </div>	
	<div> <div></div> Regular Graduate Courses with 10 or more students </div>	
	<div> <div></div> Regular UG Courses with 10 or more students </div>	
	<div> <div></div> Retention </div>	
	<div> <div></div> Assessment Recommendation Implementation </div>	
	<div> <div></div> Graduation Rate </div>	
	<div> <div></div> Total Financial Aid </div>	
<div> <div></div> Strengthen Infrastructure </div>	<div> <div></div> Progress toward integrated data reported </div>	<div> <div></div> Consolidate Data Sharing and Reporting </div>
	<div> <div></div> Auxiliary Revenue </div>	<div> <div></div> Project to Increase Residence Hall Residency </div>
	<div> <div></div> Data-driven Culture </div>	<div> <div></div> Create Data-driven Plan </div>
	<div> <div></div> Residence Hall Residency Rates </div>	<div> <div></div> ERP Staff Training Program </div>
	<div> <div></div> Staff Trained in ERP </div>	<div> <div></div> Student Spaces Plan </div>
	<div> <div></div> Student Satisfaction Inventory (SSI) Gap Scores </div>	
<div> <div></div> Build Strategic Financial Understanding </div>	<div> <div></div> Budget Managers over Budget </div>	<div> <div></div> Budget Manager Training </div>

Viability Measures - Monthly View

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Measure	Collegium	Series Status												
		Name	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15
 Total YTD Annual Unrestricted Giving	VP/University Advancement	Actual	91%	93%										
		Target	100%	100%										
 Total YTD Giving	VP/University Advancement	Actual	110%											
		Target	100%											
 % of Non-tuition Revenue	VP/University Advancement	Actual												
		Target												

Measure	Collegium	Measure Updated	Measure Update Dates	Series Status												
				Name	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14
 Traditional Undergraduate Inquiries	VP/Student Affairs	Monthly		Actual	129%	147%	126%	92%	81%	74%	93%					
				Target	100%	100%	100%	100%	100%	100%	100%					
				Year over Year change												
 Traditional Undergraduate Applications	VP/Student Affairs	Monthly		Actual	132%	125%	118%	114%	115%	112%						
				Target	100%	100%	100%	100%	100%	100%						
 Traditional Undergraduate Admits	VP/Student Affairs	Monthly		Actual	187%	170%	143%	129%	122%	116%						
				Target	100%	100%	100%	100%	100%	100%						
 Traditional Undergraduate Deposits	VP/Student Affairs	Monthly		Actual	276%	211%	122%	83%	100%	91%						
				Target	100%	100%	100%	100%	100%	100%						
 Total Undergraduate Enrollment	VP/Student Affairs	Annually		Actual						1,447.00						
				Target												
 Total Degree Completion Enrollment	VP/Student Affairs	Annually		Actual						225.00						
				Target												
 Total Graduate Enrollment	VP/Student Affairs	Annually		Actual						441.00						
				Target												

Vibrancy Measures - Monthly View

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Measure	Collegium	Measure Updated	Measure Update Dates	Series Status												
				Name	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15
 Traditional Undergraduate Inquiries	VP/Student Affairs	Monthly		Actual	93%											
				Target	100%											
				Year over Year change												
 Traditional Undergraduate Applications	VP/Student Affairs	Monthly		Actual												
				Target												
 Traditional Undergraduate Admits	VP/Student Affairs	Monthly		Actual												
				Target												
 Traditional Undergraduate Deposits	VP/Student Affairs	Monthly		Actual												
				Target												
 Total Undergraduate Enrollment	VP/Student Affairs	Annually		Actual												
				Target												
 Total Degree Completion Enrollment	VP/Student Affairs	Annually		Actual												
				Target												
 Total Graduate Enrollment	VP/Student Affairs	Annually		Actual												
				Target												
 Assessment Recommendation Implementation	Provost	Monthly		Actual												
				Target												
 Graduation Rate	Provost	Monthly		Actual												
				Target												
 Progress toward integrated data reported	VP/Finance and Business Affairs	Monthly		Actual												
				Target												
 SSI Portions	VP/Student Affairs	Monthly		Actual												
				Target												
 Student Participation	VP/Student Affairs	Monthly		Actual												
				Target												
 Curricular Governance Process	Provost	Monthly		Actual												
				Target												

Student Development Impact Reports	VP/Student Affairs	Monthly		Actual														
				Target														
Auxiliary Revenue	VP/Finance and Business Affairs	Monthly		Actual														
				Target														
Data-driven Culture	VP/Finance and Business Affairs	Monthly		Actual														
				Target														
Residence Hall Residency Rates	VP/Student Affairs	Monthly		Actual														
				Target														
Staff Trained in ERP	VP/Student Affairs	Monthly		Actual														
				Target														
Student Satisfaction Inventory (SSI) Gap Scores	VP/Student Affairs	Monthly		Actual														
				Target														
Budget Managers over Budget	VP/Finance and Business Affairs	Monthly		Actual														98%
				Target														100%
				Stretch Target														110%
Total Tuition and Fees	VP/Finance and Business Affairs	Monthly	15th	Actual														
				Target														
				Redline														
Total Other Revenue	VP/Finance and Business Affairs	Monthly		Actual														
				Target														
				Redline														
% Total Other Revenue	VP/Finance and Business Affairs	Monthly		Actual														
				Target														
Total Financial Aid	VP/Student Affairs	Monthly		Actual														
				Target														
				Redline														
Net Tuition Revenue (% of Total Revenue)	VP/Finance and Business Affairs	Monthly		Actual														
				Target														
Total University Enrollment	VP/Student Affairs	Monthly		Actual														
				Target														

Measures - Provost

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



 Measures

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Themes	Objective	Measure	Measure Description	Periodicity	Measure Updated	Measure Update Dates	Collegium	Data Owner	Data Source
 Viability	 Optimize Return on Investment	 Close Programs	Programs formally closed	Monthly	Monthly		Provost		
 Viability	 Optimize Return on Investment	 Graduation Rates	Improved graduation rate (% students graduate in less than 5 years; % students graduate in 4 years); % increase retention rate.	Monthly	Monthly		Provost		
 Viability	 Optimize Return on Investment	 New and Revised Programs	Accomplished 20% ROI - Revenue less the start up operating costs (e.g. faculty member, marketing, support) by year 2	Monthly	Monthly		Provost		
 Viability	 Optimize Return on Investment	 Operational Revenue	Operational Revenue % Actuals compared to Budget	Monthly	Monthly		Provost		
 Viability	 Optimize Return on Investment	 Regular Degree Completion Courses with 10 or more students		Monthly	Monthly		Provost		
 Viability	 Optimize Return on Investment	 Regular Graduate Courses with 10 or more students		Monthly	Monthly		Provost		
 Viability	 Optimize Return on Investment	 Regular UG Courses with 10 or more students		Monthly	Monthly		Provost		
 Viability	 Optimize Return on Investment	 Retention		Monthly	Monthly		Provost		
 Viability	 Optimize Return on Investment	 Assessment Recommendation Implementation	% implementation of recommended results from departmental Assessment Reports; Quarterly follow up from Assessment Implementation Committee on the review and implementation of the AIRs to the University Collegium.	Monthly	Monthly		Provost		
 Viability	 Optimize Return on Investment	 Graduation Rate		Monthly	Monthly		Provost		

	Investment								
 Vibrancy	 Maximize Data-Driven Decisions	 Curricular Governance Process		Monthly	Monthly		Provost		

Themes	Objective	Measure	Measure Description	Periodicity	Measure Updated	Measure Update Dates	Collegium	Data Owner	Data Source
 Viability	 Diversify & Increase Revenue	 Total YTD Annual Unrestricted Giving	Total Unrestricted Annual Giving Year-to-date % to Goal. Goals are set by CFO and VP/Advancement with approval by the President.	Monthly	Monthly	15th of the Month	VP/University Advancement		Business Office
 Viability	 Diversify & Increase Revenue	 Total YTD Giving	Total Annual Giving Year-to-date % to Goal. Goals are set by CFO and VP/Advancement with approval by the President.	Monthly	Monthly		VP/University Advancement		
 Viability	 Diversify & Increase Revenue	 % of Non-tuition Revenue	Reduce dependency on tuition revenue. Included revenue streams are auxllary income, gifts, investments, conference events, etc. Updated: Quarterly Update Dates: Oct 30, Jan 30, Apr 30, Jul 30	Monthly	Monthly		VP/University Advancement	Joy	Finance / Advancement

Themes	Objective	Measure	Measure Description	Periodicity	Measure Updated	Measure Update Dates	Collegium	Data Owner	Data Source
Viability	Diversify & Increase Revenue	Net Revenue		Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Optimize Return on Investment	Operational Expense	Operational Expense % Actuals compared to Budget	Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Optimize Return on Investment	Revenue vs Expense	Operational Revenue % to Budget and Operational Expense % to Budget	Monthly	Monthly		VP/Finance and Business Affairs		
	Strengthen Infrastructure	Progress toward integrated data reported		Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Strengthen Infrastructure	Auxiliary Revenue	Implement a plan to increase revenue from events and auxiliary services.	Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Strengthen Infrastructure	Data-driven Culture	Pursue options for data management and analytics warehouse for information sharing across campus.	Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Build Strategic Financial Understanding	Budget Managers over Budget	Percentage of Budget owners over budget	Monthly	Monthly		VP/Finance and Business Affairs		Finance Office
Viability	Diversify & Increase Revenue	Total Tuition and Fees	Total Revenue and Fees across the University	Monthly	Monthly	15th	VP/Finance and Business Affairs	Tracy Miller	
Viability	Diversify & Increase Revenue	Total Other Revenue	Total non-tuition revenue across the University	Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Diversify & Increase Revenue	% Total Other Revenue	Other revenue as a percentage of Total Revenue	Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Diversify & Increase Revenue	Net Tuition Revenue (% of		Monthly	Monthly		VP/Finance and	Finance Office	

Themes	Objective	Measure	Measure Description	Periodicity	Measure Updated	Measure Update Dates	Collegium	Data Owner	Data Source
▬ Visibility	▬ Increase Awareness	▬ Traditional Undergraduate Inquiries	Inquiries Year-to-date % to Goal	Monthly	Monthly		VP/Student Affairs	Admissions Office	Admissions Office
▬ Visibility	▬ Increase Awareness	▬ Traditional Undergraduate Applications	Inquiries Year-to-date % to Goal	Monthly	Monthly		VP/Student Affairs	Admissions Office	Admissions Office
▬ Visibility	▬ Increase Awareness	▬ Traditional Undergraduate Admits	Traditional Undergraduate Admits Year-to-date % to Goal	Monthly	Monthly		VP/Student Affairs	Admissions Office	Admissions Office
▬ Visibility	▬ Increase Awareness	▬ Traditional Undergraduate Deposits	Traditional Undergraduate Admits Year-to-date % to Goal	Monthly	Monthly		VP/Student Affairs	Admissions Office	Admissions Office
▬ Viability	▬ Increase Awareness	▬ Total Undergraduate Enrollment		Monthly	Annually		VP/Student Affairs		
▬ Viability	▬ Increase Awareness	▬ Total Degree Completion Enrollment		Monthly	Annually		VP/Student Affairs		
▬ Viability	▬ Increase Awareness	▬ Total Graduate Enrollment		Monthly	Annually		VP/Student Affairs		
	▬ Develop a Student-Centered Culture	▬ SSI Portions		Monthly	Monthly		VP/Student Affairs		
	▬ Develop a Student-Centered Culture	▬ Student Participation		Monthly	Monthly		VP/Student Affairs		
	▬ Maximize Data-Driven Decisions	▬ Student Development Impact Reports		Monthly	Monthly		VP/Student Affairs		
▬ Viability	▬ Strengthen Infrastructure	▬ Residence Hall Residency Rates		Monthly	Monthly		VP/Student Affairs		
▬ Viability	▬ Strengthen Infrastructure	▬ Staff Trained in ERP	Increase % staff trained on the use of the ERP system (Jenzabar); Increase % participation in Finishline; Increase % participation in employee training (e.g. IT summer courses)	Monthly	Monthly		VP/Student Affairs		

— Viability	— Strengthen Infrastructure	— Student Satisfaction Inventory (SSI) Gap Scores	Increase % staff trained on the use of the ERP system (Jenzabar); Increase % participation in Finishline; Increase % participation in employee training (e.g. IT summer courses)	Monthly	Monthly		VP/Student Affairs		
— Viability	— Optimize Return on Investment	— Total Financial Aid	Total Financial Aid distribution as YTD % to Goal	Monthly	Monthly		VP/Student Affairs		
— Visibility	— Increase Awareness	— Total University Enrollment		Monthly	Monthly		VP/Student Affairs		

Measures - Full Details

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Themes	Objective	Measure	Measure Description	Periodicity	Measure Updated	Measure Update Dates	Collegium	Data Owner	Data Source
Visibility	Increase Awareness	Traditional Undergraduate Inquiries	Inquiries Year-to-date % to Goal	Monthly	Monthly		VP/Student Affairs	Admissions Office	Admissions Office
Visibility	Increase Awareness	Traditional Undergraduate Applications	Inquiries Year-to-date % to Goal	Monthly	Monthly		VP/Student Affairs	Admissions Office	Admissions Office
Visibility	Increase Awareness	Traditional Undergraduate Admits	Traditional Undergraduate Admits Year-to-date % to Goal	Monthly	Monthly		VP/Student Affairs	Admissions Office	Admissions Office
Visibility	Increase Awareness	Traditional Undergraduate Deposits	Traditional Undergraduate Admits Year-to-date % to Goal	Monthly	Monthly		VP/Student Affairs	Admissions Office	Admissions Office
Viability	Increase Awareness	Total Undergraduate Enrollment		Monthly	Annually		VP/Student Affairs		
Viability	Increase Awareness	Total Degree Completion Enrollment		Monthly	Annually		VP/Student Affairs		
Viability	Increase Awareness	Total Graduate Enrollment		Monthly	Annually		VP/Student Affairs		
Viability	Diversify & Increase Revenue	Total YTD Annual Unrestricted Giving	Total Unrestricted Annual Giving Year-to-date % to Goal. Goals are set by CFO and VP/Advancement with approval by the President.	Monthly	Monthly	15th of the Month	VP/University Advancement		Business Office
Viability	Diversify & Increase Revenue	Total YTD Giving	Total Annual Giving Year-to-date % to Goal. Goals are set by CFO and VP/Advancement with approval by the President.	Monthly	Monthly		VP/University Advancement		
Viability	Diversify & Increase Revenue	% of Non-tuition Revenue	Reduce dependency on tuition revenue. Included revenue streams are auxliary income, gifts, investments, conference events, etc. Updated: Quarterly Update Dates: Oct 30, Jan 30, Apr 30, Jul 30	Monthly	Monthly		VP/University Advancement	Joy	Finance / Advancement
Viability	Diversify & Increase Revenue	Net Revenue		Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Optimize Return on Investment	Close Programs	Programs formally closed	Monthly	Monthly		Provost		
Viability	Optimize Return on Investment	Graduation Rates	Improved graduation rate (% students graduate in less than 5	Monthly	Monthly		Provost		

▬ Viability	▬ Return on Investment	▬ Graduation Rates	years; % students graduate in 4 years); % increase retention rate.	Monthly	Monthly		Provost		
▬ Viability	▬ Optimize Return on Investment	▬ New and Revised Programs	Accomplished 20% ROI - Revenue less the start up operating costs (e.g. faculty member, marketing, support) by year 2	Monthly	Monthly		Provost		
▬ Viability	▬ Optimize Return on Investment	▬ Operational Revenue	Operational Revenue % Actuals compared to Budget	Monthly	Monthly		Provost		
▬ Viability	▬ Optimize Return on Investment	▬ Operational Expense	Operational Expense % Actuals compared to Budget	Monthly	Monthly		VP/Finance and Business Affairs		
▬ Viability	▬ Optimize Return on Investment	▬ Revenue vs Expense	Operational Revenue % to Budget and Operational Expense % to Budget	Monthly	Monthly		VP/Finance and Business Affairs		
▬ Viability	▬ Optimize Return on Investment	▬ Regular Degree Completion Courses with 10 or more students		Monthly	Monthly		Provost		
▬ Viability	▬ Optimize Return on Investment	▬ Regular Graduate Courses with 10 or more students		Monthly	Monthly		Provost		
▬ Viability	▬ Optimize Return on Investment	▬ Regular UG Courses with 10 or more students		Monthly	Monthly		Provost		
▬ Viability	▬ Optimize Return on Investment	▬ Retention		Monthly	Monthly		Provost		
▬ Viability	▬ Optimize Return on Investment	▬ Assessment Recommendation Implementation	% implementation of recommended results from departmental Assessment Reports; Quarterly follow up from Assessment Implementation Committee on the review and implementation of the AIRs to the University Collegium.	Monthly	Monthly		Provost		
▬ Viability	▬ Optimize Return on Investment	▬ Graduation Rate		Monthly	Monthly		Provost		
	▬ Strengthen Infrastructure	▬ Progress toward integrated data reported		Monthly	Monthly		VP/Finance and Business Affairs		
	▬ Develop a Student-Centered Culture	▬ SSI Portions		Monthly	Monthly		VP/Student Affairs		
	▬ Develop a Student-Centered Culture	▬ Student Participation		Monthly	Monthly		VP/Student Affairs		
▬ Vibrancy	▬ Maximize Data-Driven	▬ Curricular Governance		Monthly	Monthly		Provost		

	Decisions	Process							
	Maximize Data-Driven Decisions	Student Development Impact Reports		Monthly	Monthly		VP/Student Affairs		
Viability	Strengthen Infrastructure	Auxiliary Revenue	Implement a plan to increase revenue from events and auxiliary services.	Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Strengthen Infrastructure	Data-driven Culture	Pursue options for data management and analytics warehouse for information sharing across campus.	Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Strengthen Infrastructure	Residence Hall Residency Rates		Monthly	Monthly		VP/Student Affairs		
Viability	Strengthen Infrastructure	Staff Trained in ERP	Increase % staff trained on the use of the ERP system (Jenzabar); Increase % participation in Finishline; Increase % participation in employee training (e.g. IT summer courses)	Monthly	Monthly		VP/Student Affairs		
Viability	Strengthen Infrastructure	Student Satisfaction Inventory (SSI) Gap Scores	Increase % staff trained on the use of the ERP system (Jenzabar); Increase % participation in Finishline; Increase % participation in employee training (e.g. IT summer courses)	Monthly	Monthly		VP/Student Affairs		
Viability	Build Strategic Financial Understanding	Budget Managers over Budget	Percentage of Budget owners over budget	Monthly	Monthly		VP/Finance and Business Affairs		Finance Office
Viability	Diversify & Increase Revenue	Total Tuition and Fees	Total Revenue and Fees across the University	Monthly	Monthly	15th	VP/Finance and Business Affairs	Tracy Miller	
Viability	Diversify & Increase Revenue	Total Other Revenue	Total non-tuition revenue across the University	Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Diversify & Increase Revenue	% Total Other Revenue	Other revenue as a percentage of Total Revenue	Monthly	Monthly		VP/Finance and Business Affairs		
Viability	Optimize Return on Investment	Total Financial Aid	Total Financial Aid distribution as YTD % to Goal	Monthly	Monthly		VP/Student Affairs		
Viability	Diversify & Increase Revenue	Net Tuition Revenue (% of Total Revenue)		Monthly	Monthly		VP/Finance and Business Affairs	Finance Office	
Visibility	Increase Awareness	Total University Enrollment		Monthly	Monthly		VP/Student Affairs		

Objectives	Initiative	Initiative Description	Initiative Owner	Initiative Budget	Funding Source	Start Date	End Date
Optimize Return on Investment	Start New Academic Programs	Implement at least one new market-driven and one revised program or major each year		\$150,000		5/30/14	5/30/14
	Identify Academic Programs to Close	Develop an appropriate plan for identifying unproductive or obsolete programs (philosophical, fiscal, mission-related concerns)		\$30-55,000		5/30/14	5/30/14
	Study of Academic Efficiency	Capacity study with reference to the current faculty, staff, physical classroom, and distance education resources.				5/30/14	5/30/14

Objectives	Initiative	Initiative Description	Initiative Owner	Initiative Budget	Funding Source	Start Date	End Date
Invest in Marketing Resources	Redesign Website	Contract with vendor to do a website refresh.	Marketing	\$50,000	Budget	3/1/14	5/30/14
Diversify & Increase Revenue	Increase conference and camping revenue	Increase number and broaden types of camps, improve marketing, ect. / Decrease the reliance on tuition revenue through other revenue opportunities such as facility rentals, dormitory maximization, academic and sports camps, speakers' bureau.	Cindy	Reallocation	\$35,000	1/1/14	8/31/14
	Study Net Tuition by Program	Develop plan to review and project net tuition dollars for each program; analyze the contribution margins and review profitability.		\$7,000		5/30/14	5/30/14
Strengthen Infrastructure	Consolidate Data Sharing and Reporting					3/27/14	3/27/14
	Create Data-driven Plan					5/31/14	5/31/14
	ERP Staff Training Program			\$15,000		5/31/14	5/31/14
Build Strategic Financial Understanding	Budget Manager Training					5/31/14	5/31/14

Initiatives - VP/Student Affairs

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Objectives	Initiative	Initiative Description	Initiative Owner	Initiative Budget	Funding Source	Start Date	End Date
<div> <div></div> Diversify & Increase Revenue </div>	<div> <div></div> Recruiting Strategies </div>	Improve strategies for recruiting and retaining undergraduate, graduate and non-traditional students, with various modes of delivery to increase net revenue		\$150,000 annually		7/1/14	6/30/15
<div> <div></div> Strengthen Infrastructure </div>	<div> <div></div> Project to Increase Residence Hall Residency </div>					5/31/14	5/31/14
	<div> <div></div> Student Spaces Plan </div>					5/31/14	5/31/14

Objectives	Initiative	Initiative Description	Initiative Owner	Initiative Budget	Funding Source	Start Date	End Date
<div> <div></div> <div>Diversify & Increase Revenue</div> </div>	<div> <div></div> <div>Increase Board Giving</div> </div>		Stephen			2/8/14	6/30/14
	<div> <div></div> <div>Increase Annual Fund</div> </div>	Increase the annual fund, increase reserves, and grow endowment through aggressive fundraising, alumni involvement, and board action.		\$225,000		5/30/14	5/30/14
	<div> <div></div> <div>Increase Endowment</div> </div>	Increase the annual fund, increase reserves, and grow endowment through aggressive fundraising, alumni involvement, and board action.				5/30/14	5/30/14
	<div> <div></div> <div>Increase Major Gifts</div> </div>	Create a plan/document with descriptions and definitions inline with industry standards (private HE)		\$5,000		5/30/14	5/30/14

Themes	Objective
<div><div></div>Visibility</div>	<div><div></div>Increase Awareness</div>
	<div><div></div>Invest in Marketing Resources</div>
	<div><div></div>Develop Market Focus</div>
	<div><div></div>Clarify Brand Promise</div>
<div><div></div>Viability</div>	<div><div></div>Diversify & Increase Revenue</div>
	<div><div></div>Optimize Return on Investment</div>
	<div><div></div>Strengthen Infrastructure</div>
	<div><div></div>Build Strategic Financial Understanding</div>
<div><div></div>Vibrancy</div>	<div><div></div>Advance Learning Outcomes</div>
	<div><div></div>Align Resources with Priorities</div>
	<div><div></div>Maximize Data-Driven Decisions</div>
	<div><div></div>Develop a Student-Centered Culture</div>

<https://www.dropbox.com/s/irdsg09a30nt864/Screenshot%202014-09-02%2015.54.27.png?dl=0>

[illegible]

Today's Date: _____

Current: Changed to: % Change:

NEW HIRE CHECKLIST

Department Supervisor

- ☐ Complete HR Action Form with all appropriate signatures
- ☐ Extend employment offer to candidate after HR Action Form is approved
- ☐ Forward HR Action Form, job description, application, and resume to Human Resources
- ☐ Request keys from Physical Plant Office (employee may pick up)
- ☐ Instruct new employee to contact Human Resources to schedule orientation

The above steps were followed: _____
Signature

Human Resources Only

- ☐ Send new hire packet (tax forms, I-9, benefit info, etc.) to new employee
- ☐ Schedule new employee orientation
- ☐ IT Helpdesk ticket #: _____
- ☐ Initiate other HR protocol according to checklists
- ☐ Schedule new employee orientation

EMPLOYEE TERMINATION CHECKLIST

Department Supervisor

- ☐ Request letter of resignation with employee signature and date
- ☐ Complete HR Action Form with all appropriate signatures
- ☐ Forward letter of resignation to Human Resources Office attached to HR Action Form
- ☐ Confirm last day worked with Director of Human Resources
- ☐ Confirm remaining vacation days with Director of Benefits & Payroll
- ☐ Turn in outstanding travel/cash advance to Business Office
- ☐ Turn in phone to IT if applicable
- ☐ Turn in keys, employee ID card, and parking pass to Human Resources
- ☐ Obtain Exit Interview Questionnaire from Director of Human Resources

The above steps were followed: _____
Signature

Human Resources Only

- ☐ Provide Exit Interview Questionnaire (HR Director)
- ☐ Confirm date of last day worked (HR Director)
- ☐ Notify appropriate departments of employee termination (HR Manager)
- ☐ IT Helpdesk ticket #: _____
- ☐ Initiate other HR protocol according to checklists

V. STRATEGIC PLAN IMPACT (Analysis is required)

A. Please refer to the University's Strategic Plan and select the appropriate points that substantiates this position. Provide a paragraph summarizing the necessity of the requested position and the financial impact on the University. Define the cost savings or re-direction of funds if applicable. If there is a legal impact to the University, please determine the aspects that may be affected. The University President reserves the right to make all final determinations.

B. If this position is not filled, define the financial and workload impact on the University.

Recommended by:

Manager/Supervisor/Director

Date

Approved by:

University Collegium Member

Date

Approved by:

Director of Human Resources

Date

Approved by:

CFO/VP Finance & Accounting

Date

Approved by:

University President

Date

MALONE UNIVERSITY
Board of Trustees
February 8, 2014

Board Directives

Recognizing the urgency associated with our mutually agreed upon Strategic Plan theme of “***Viability: Improving Our Margins;***” and recognizing the importance of taking immediate steps to improve multiple metrics currently reflecting institutional and marketplace realities which, together with efforts to sustain and enhance enrollment and grow and diversify non-tuition revenues, will support the University’s efforts to reconcile the current and projected budget shortfalls over a three-year period; the Board of Trustees, in prayerful reflection, establishes the following Directives to be carried out in collaboration with the University administration, staff, Faculty Senate, and full Faculty.

1. Recognizing that tuition revenue alone will no longer sustain us;
 - a. By June 30, 2016, reduce tuition as a percentage of overall revenue from 91% (Integrated Post-Secondary Educational Data Systems/IPEDS, Fiscal Year 2012) to 85% (initial projection) with a long term (5-7 years) objective of aligning Malone’s tuition revenue as a percentage of total revenue in line with our IPEDS Benchmark Group (IPEDS FY12 data - 79%); and,
 - b. By June 30, 2016, increase revenue from Private Gifts, Grants and Contracts as a percentage of overall revenue from 7% (IPEDS FY12 data) to 10% (initial projection) with a long term (5-7 years) objective of aligning Malone’s revenue from Private Gifts, Grants and Contracts as a percentage of total revenue in line with our IPEDS Benchmark Group (IPEDS FY12 data - 15%).
2. Develop by June 15 a “Program Launch and Implementation Task Force” to support the academic units (i.e. college, schools, departments, Curriculum Development Committees and their leadership) and program development processes with administrative and marketing aspects of program development, launch and enrollment. The Program Launch and Implementation Task Force will be convened and facilitated by Joy Brathwaite and work collaboratively with Dr. Tucker and the academic units.
3. Develop by August 1 action steps to reduce the overall cost of instruction. Among other considerations, these steps should identify an affordable, sustainable, and manageable target for the University’s student-to-faculty ratio, based on identified metrics, and the steps to achieve that ratio by Fall 2016.

4. Develop by August 1 action steps to:
 - a. Develop an ongoing cycle of assessment and improvement for sustainability (i.e. affordability) and transferability (i.e. access) of the General Education program while enhancing the student experience in shared “core” or “signature” programs;
 - b. Reduce the cost of delivering the General Education program by 25% (initial projection) by June 30, 2016; and,
 - c. Maintain the quality and desired outcomes of the General Education program as articulated in the University’s Educational Goals.
5. Develop by August 1 steps to be implemented to capture efficiencies and generate non-tuition revenue by:
 - a. Increasing by 20% (initial projection) the summer camps and conferences revenue for Fiscal Year 2015 (and FY16 recognizing summer 2015 camps and conferences revenue is largely achieved in June, July and August);
 - b. Increasing by 50% (initial projection) the number of summer academic and athletic camps targeting middle and high school students;
 - c. Achieve \$100,000 in these non-tuition revenues in FY14-15, increasing to \$200,000 or more per year by FY20; and,
 - d. Identify 1-2 operations for outsourcing and / or partnerships.
6. Develop by June 15 a determination on non-academic and academic programs to be eliminated and a proposed time line for the eliminations. This should include:
 - a. Elimination and consolidation of academic majors and the associated reduction of faculty positions;
 - b. Identification of efficiencies that can be gained by reducing academic structure and implementation of an ongoing cycle of review to measure continued effectiveness and sustainability;
 - c. Reduction of the number of intercollegiate athletic teams and associated costs; and,
 - d. Identification of successful and high market value programs (academic and non-academic) for marketing and programmatic investment to stimulate *Visibility* and enrollment growth.

KEY METRICS for DASHBOARD INDICATORS

Strategic Theme (Objective)	Measure	Frequency	Constituency		
VISIBILITY			<i>BOT</i>	<i>VPs, Deans</i>	<i>Public</i>
Increase Awareness	Size of inquiry pool	Monthly	X	X	
	Enrollment – UG traditional	Fall, Spring, Summer terms	X	X	X
	Enrollment – degree completion	Fall, Spring, Summer terms	X	X	X
	Enrollment – graduate programs	Fall, Spring, Summer terms	X	X	X
Invest in Marketing Expertise	NA				
Develop Marketing Focus	NA				
Clarify Band Promise	NA				
VIABILITY			<i>BOT</i>	<i>VPs, Deans</i>	<i>Public</i>
Diversity and Increase Revenue	Total YTD unrestricted giving	Monthly	X	X	
	Total YTD giving	Monthly		X	X
	Auxiliary income	Monthly	X		
	YTD Expense vs. Giving	Quarterly		X	
	Net revenue per student	Quarterly	X		
	Gross tuition revenue	Quarterly	X		
	Net revenue as % of total revenue	Yearly	X	X	X
	ⁱ Contributions as % of revenue	Yearly	X	X	X

	Gross room and board revenue	Quarterly		X	
	Discount rate % (overall, first year, athletic)	Quarterly	X	X	
	Income from events, camps, conferences	Yearly		X	
Optimize Return on Investment	Residence hall occupancy rates	Fall, Spring		X	
	% Classes with >10 students	Fall, Spring, Summer		X	
	Retention rates by student category (traditional, degree completion, graduate)	Yearly	X	X	X
	Implement one new market-driven or revised program or major	Yearly	X	X	X
Strengthen Infrastructure	Staff training and professional development – participation %	Yearly		X	
	Use of assessment impact reports			X	
	Residence hall occupancy rates	Fall, Spring, Summer		X	
	Cash position	Quarterly	X	X	
Build Strategic Financial Understanding	Budget managers within monthly allocation margins (adherence to operating budget)	Monthly		X	
	% Participation in employee giving	Yearly		X	
	% Lead generations in advancement	Quarterly		X	
VIBRANCY			BOT	VPs, Deans	Public
Advance Learning Outcomes	Graduation rates	Yearly	X	X	X
	Analysis of NSSE data re effective teaching	Biannually		X	

	Alumni placement (jobs and graduate schools)	Yearly	X	X	X
	SFO opportunities - % involvement	Monthly		X	
	Student outcomes and participation rates (internships, service learning, study away)	Fall, Spring, Summer		X	
Align Resources with Priorities	Analysis of budget lines and strategic planning - % operating budget and % capital budget tied to Learning Impact Reports and Program Assessment Impact Reports	Yearly		X	
	% Employee participation in professional development	Yearly		X	
	Strengthen academic support programs	NA			
Maximize Data-Driven Decisions	Assessment Impact Reports – peer comparison benchmarks	NA			
	Student Development impact reports	NA			
	Opportunities for interaction and discussion of “best practices”	NA			
Promote Student-Centered Culture	Review SSI gap scores	NA - Biannual		X	
	Student participation data (clubs, activities, tutoring, SFOs)	NA – Yearly		X	
	Analysis of NSSE data regarding student engagement	NA – Biannual		X	
Other Measures (U.S. News and World Report Rankings)			BOT	VPs, Deans	Public
	Class size - % at <20	Yearly		X	X

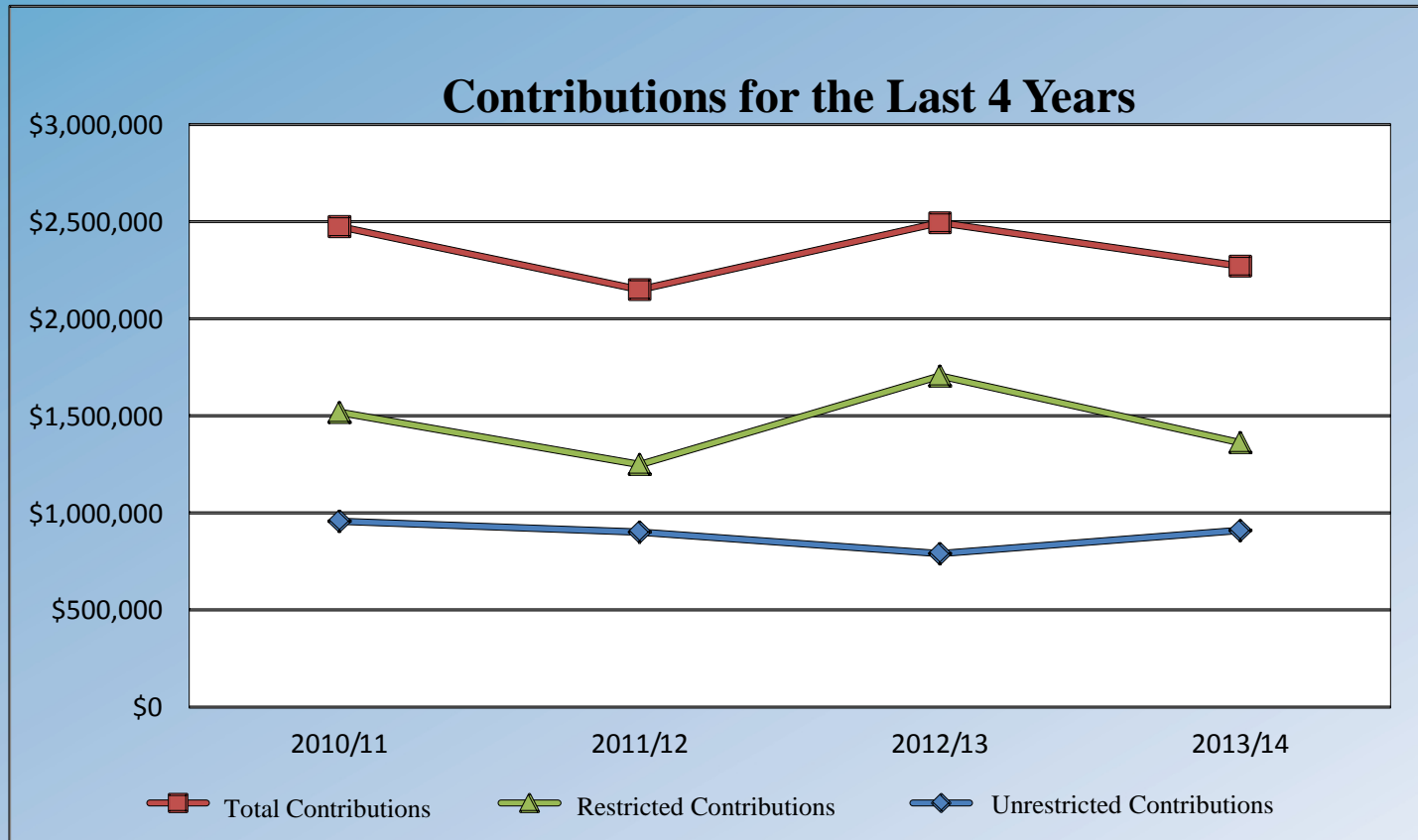
	Class size - % at >50	Yearly		X	
	Avg. Faculty Salary and Benefits	Yearly	X	X	
	Student Selectivity – ACT composite	Fall entering cohort		X	X
	Student Selectivity – top 10% grads from high school	Fall entering cohort		X	
	Student Selectivity – top 25% grads from high school	Fall entering cohort		X	
	Student Selectivity – acceptance rate	Fall entering cohort		X	X
	Financial Resources – spending per student on instruction	Yearly	X	X	
	Financial Resources – spending per student on student services	Yearly	X	X	
	Alumni giving	Monthly	X	X	
Other Possible Measures (Internal Analysis Data)			BOT	VPs, Deans	Public
Student demographic data (religion, ethnicity, economic status, degree level, “feeder” schools)					
Faculty data (headcount by school, tenure status, student to faculty ratios, # by rank, % terminal degrees, average teaching loads, faculty productivity data)					
Course information (# 100-level courses taught by FT or PT; high demand/low demand courses; completion and/or failure rates; GPA distributions)					

Miscellaneous information (trends in online enrollments; # of online courses by program)					
% Faculty with terminal degrees					
Course DFW %					
# Class sections at 90% cap					
% Courses taught by adjunct					

ⁱ Update by D Tucker, September 4, 2014



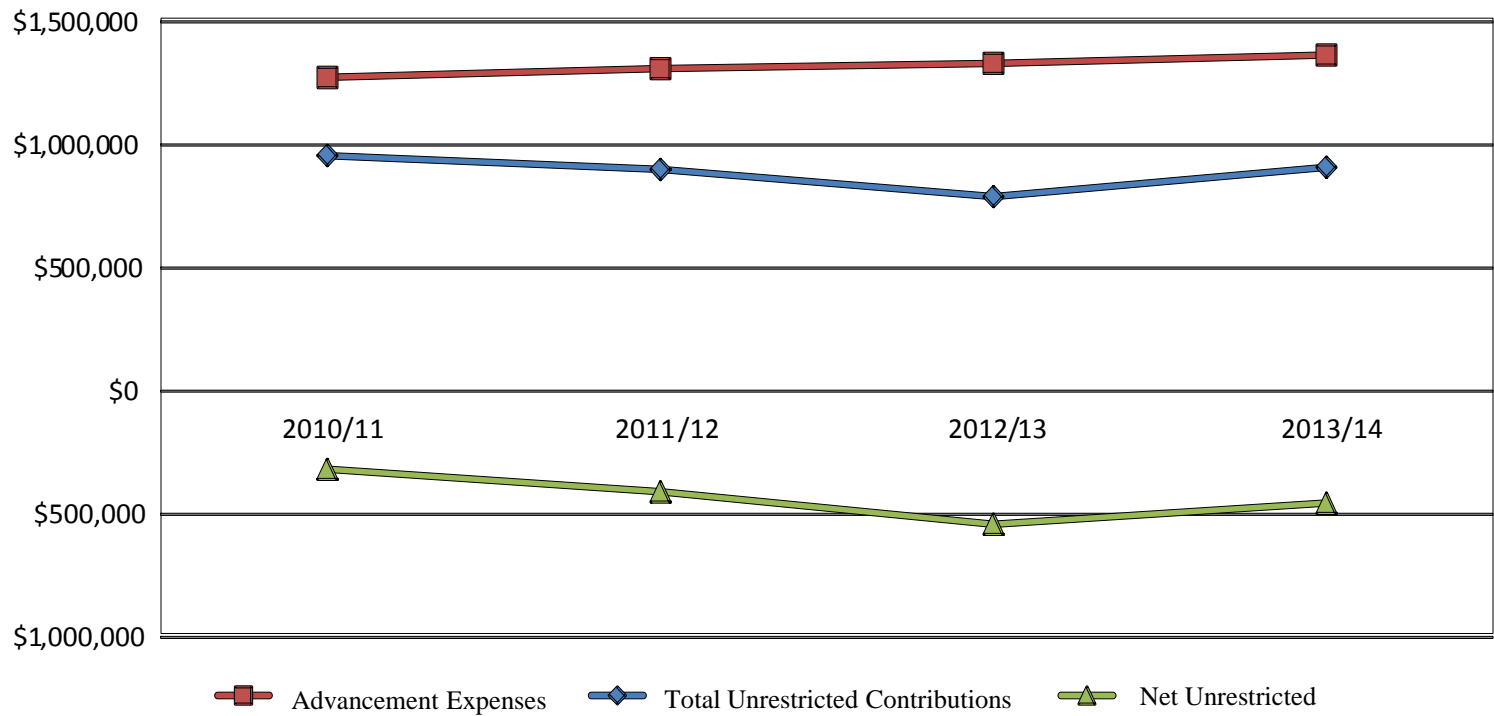
MALONE UNIVERSITY





MALONE UNIVERSITY

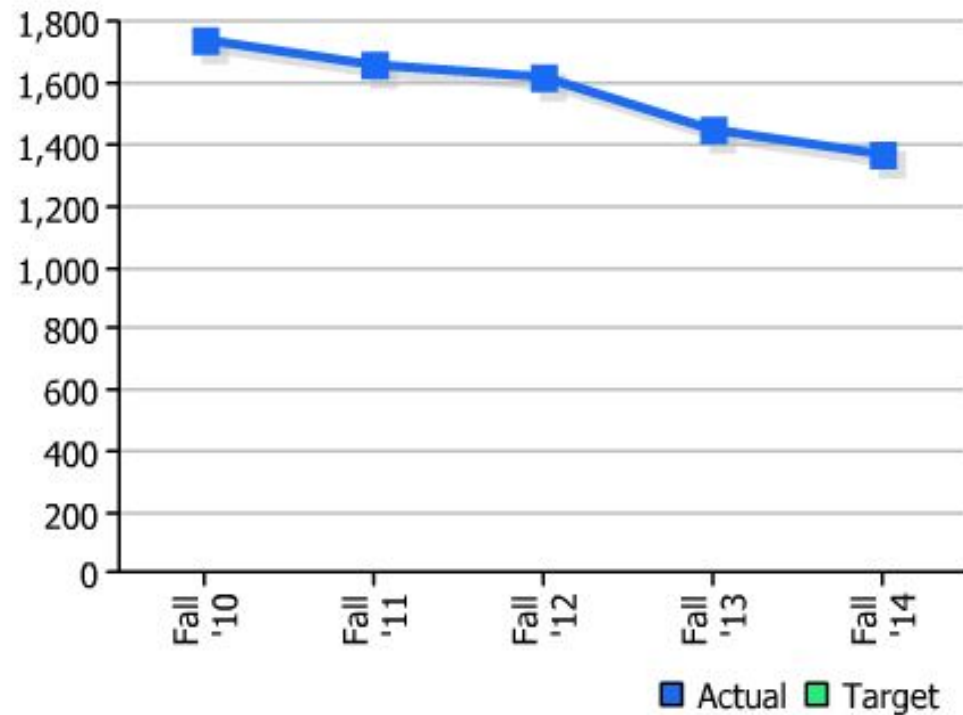
Net Unrestricted Contributions for the Last 4 Years





MALONE UNIVERSITY

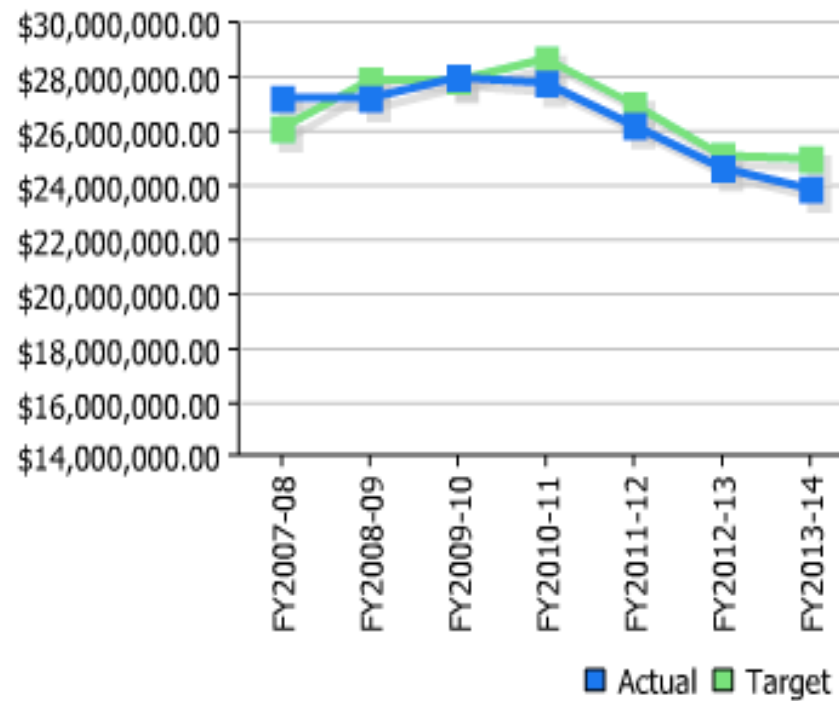
Total Undergraduate Enrollment





MALONE UNIVERSITY

Net Revenue



UNIVERSITY COLLEGIUM GOALS FOR 2014-2015

Chris Abrams – Student Affairs

The following goals work in tandem with the current Malone University Strategic Plan as follows:

- 1) **Visibility: Building our Reputation:** This theme concentrates on institutional identity and reputation, commitments to both internal and external constituencies, and increased awareness of Malone's strengths and distinctive.
 - a. Goal: Continue to improve Malone's visibility with the faith community especially the EFC-ER through building on Malone's youth Group travel group program as well as a new campaign, through mailings (letters, postcards, folders), that increases our recognition with area Pastors and Youth Pastors.
- 2) **Viability: Improving Our Margins:** This theme reinforces the importance of financial strength, University infrastructure, and return on investment.
 - a. Goal: Increase incoming increase incoming Fall 2015 freshmen and transfer group by 5% or 20 students
 - b. Goal: Decrease incoming Fall 2015 freshman and transfer group financial aid by 2% or approximately \$540 per student
 - c. Goal: Research and compile data (Like the JAAR) that allows university leadership to make long term decisions regarding athletics for institutional viability
 - d. Goal: Increase GPS partnerships with local business, schools and hospitals by 5-10 with an increase of 20+ graduate and 20+ MMP students
- 3) **Vibrancy: Transforming Our Students:** This theme clarifies our commitment to holistic education, decision making informed by appropriate data analysis, and proper alignment of resources with institutional priorities.
 - a. Goal: Increase overall athlete (Fall to Spring) GPA from 3.0 to 3.15
 - b. Goal: Maintain #1 ASR score in the GLIAC and top 10% in NCAA Division II

Joy Brathwaite – Finance and Business

VIABILITY

- Refinance current debt and emergency line of credit
- Diversify Revenue by increase the revenue from events, conferences, etc.
- Revisit and re-formulate 3-5 year IT and Physical Plant maintenance and enhancement plans to support the campus concept
- Consistently present on the Key Performance Indicators (KPIs) for the industry and Malone to the collegium and board
- Consistently report and analyze monthly budget performance with the collegium
- Address the need for redundancies and cross-training in the Finance and Business division's systems
- Create a cash reserves policy for presentation and implementation to the collegium, BOT, and appropriate staff/faculty
- Gain clarity and support the capital campaign process in my role as VP for Finance.
- Support the VP of Enrollment in efforts to reduce the discount and increase net tuition and fees revenue per student
- Work with Credo and the Provost to improve the Strategic Plans' tracking metrics
- Work with the Space Committee to develop a plan for managing space
- Work with the VP of Marketing to support the Program Launch Task Force

Mike Fairless – Human Resources

Developing a Student Centered Culture

Traditionally, student engagement focus has been within the academic departments, yet support services, like the Human Resource Office can play a big role in delivering a great student experience. As that support, we want to build on the established good standards of practice within our office, plus engage with the other academic and support departments.

We must challenge the ways in which we work to embrace our student population by providing service and support to our valued staff and faculty. By taking care of our associates, we ensure prepared and enthused colleagues ready to engage the student population, which promises an enriched student experience.

With this in mind, the following Human Resource goals are slated for the FY2014 - 2015:

1) Colleague Morale - VIABLE

- a. We have processed 31 terminations over the past year which has posed a morale issue, especially with staff. We would like to start a discussion as to possible “workshops” and/or “in-services” to work on employee relations and morale. This can also be a format for basic training in diversity and inclusion and other subjects key to our strategic plan. The benefit from showing an interest in our colleagues and the value created from this engagement, may prepare us to enrich the student experience. This will be monitored for HLC purposes with data collected from employee opinion surveys.
- b. A plan to develop an employee incentive program is currently in the research process. We feel incentives will help build trust and the feeling of value between the colleague and the University.

2) Onboarding - VIABLE

- a. Over the past year we have worked to change forms and simplify the new employee process. We have also made available forms and processes on Malone Xpress. Our next step is to enhance the orientation process by expanding the new hire process into the departments. The HR Action Form list will be changed to better enable the departmental administrative assistant with preparation of the colleague’s arrival.
- b. Implement the “New Hire Checklist”.
- c. Implement a “New Employee Survey” to monitor and receive feedback of Human Resource practices during the new hire processes. Data will be collected for HLC purposes.
- d. We would like to develop a building /office virtual tour video that new and existing employees can access.
- e. To maximize timesheet processing for coaches and off-site workers, a “quick” link on the Malone app will be discussed.
- f. Develop employee training on the subject of “sexual assault and harassment”. We will continue to expand on our departmental cross-training.

3) Federal Work Study - VIABLE

- a. This past year, we implemented the online timesheets for students, streamlined the work-study processes, and initiated the semi-monthly pays per student demand. We would like to take this one step further and initiate the “direct deposit” process.

- b. To better prepare students for work on campus, a pre-employment job application will be required to facilitate placement in positions on campus. This will be included in their initial “student work packet” that they receive upon award.
- c. To facilitate departmental control, federal work study and non-work study budgets are to be determined and dispersed to departments employing students.

4) Payroll - VIABLE

- a. Initiate the on-line hourly staff and salary attendance forms (timesheet) in the attempt to go paperless and to facilitate the benefit process (September 2014).
- b. ADP training for report writing (Aug 2014).
- c. Jenzabar training for report writing (Fall 2014 – 2015) in attempt to utilize Jenzabar as the HRIS (Human Resource Information System); process involves moving personnel data from spreadsheets to Jenzabar.

Summary of Goals	Suggestions and/or Changes	Impact of Changes	Assessment (if applicable)
<p><u>Colleague Morale</u></p> <p>We have processed 31 terminations over the past year which has posed a morale issue, especially with staff.</p> <p>A plan to develop an employee incentive program is currently in the research process.</p>	<p>“Workshops” and/or “In-services” to work on employee relations and morale.</p> <p>Basic training in diversity and inclusion and other subjects key to our strategic plan.</p> <p>Developmental stage.</p>	<p>The benefit from showing an interest in our colleagues and the value created from this engagement, may prepare us to enrich the student experience.</p> <p>Build trust and the feeling of value between the colleague and the University.</p>	<p>This will be monitored for HLC purposes with data collected from employee opinion surveys.</p>

<p><u>Onboarding</u></p> <p>Change/simplify the new employee process. We have also made available forms and processes on Malone Xpress.</p> <p>Enhance the orientation process for new hires (administrative and staff) by expanding the new hire process into the departments.</p> <p>Created a fillable HR Action Form with a second page to reflect the strategic plan initiative.</p> <p>We would like to develop a building /office virtual tour video that new and existing employees can access.</p>	<p>Simplified paperwork by placing forms and processes on Malone Xpress.</p> <p>Implemented the “New Hire Checklist” (July 2014).</p> <p>Revised old form and scheduled for distribution to all employees effective July 2014.</p> <p>Research stage.</p>	<p>This is part of HR’s attempt to go paperless and to be cost effective in its processes.</p> <p>Will create uniformity of the orientation process campus-wide. Enable the departmental administrative assistant with preparation of the colleague’s arrival.</p> <p>Control in the hiring process.</p> <p>Available to new and existing employees for reference to buildings and departments.</p>	<p>Will survey supervisors for suggestions and feedback.</p> <p>Data will be collected for needed modifications to the process and HLC purposes.</p>
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<p>To maximize timesheet processing for coaches and off-site workers, a “quick” link on the Malone app will be discussed.</p>	<p>Research stage.</p>	<p>Coaching staff to maintain accurate records and track part-time coaching hours (under 25).</p>	
<p>Develop employee training on the subject of “sexual assault and harassment”. We will continue to expand on our departmental cross-training.</p> <p><u>Federal Work Study</u></p>	<p>Research stage. Federal law is dictating a protocol for incidents and an education process for students and employees.</p>	<p>Aim to prevent occurrences by keeping a safe environment for students and employees.</p>	
<p>Initiate the “direct deposit” process.</p>	<p>Piloted in Summer 2014. With guidance from the business office, we are offering a choice for a “live” check or direct deposit.</p>	<p>This has been a request from students and parents for several years. This action requires no extra cost and reduces workload for business office cashiers by handing out checks individually. Reduce costs of mailing checks to students at the end of semesters.</p>	
<p>A pre-employment job application will be required to facilitate placement in positions on campus.</p>	<p>This will be included in their initial “student work packet” that they receive upon award.</p>	<p>Facilitate supervisors in the placement of students according to skills.</p>	
		6	

<p>To facilitate departmental control, federal work study and non-work study budgets are to be determined and dispersed to departments employing students.</p> <p><u>Payroll</u></p> <p>Initiate the on-line hourly staff and salary attendance forms (timesheet).</p> <p>ADP training for report writing.</p> <p>Jenzabar training for report writing in attempt to utilize Jenzabar as the HRIS (Human Resource Information System)</p>	<p>Research stage.</p> <p>Developmental stages; planned activation – September 2014</p> <p>August 2014 training for employee and student payroll areas.</p> <p>(Fall 2014 – 2015); process involves moving personnel data from spreadsheets to Jenzabar.</p>	<p>Departments to manage their own budgets; give control back to the departments.</p> <p>Facilitate the benefit process by eliminating manual tracking.</p> <p>Track employee modifications and other payroll processes.</p> <p>One system to house information instead of several spreadsheets.</p>	
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Don Tucker – Academics

Note: As much as possible, each item listed is connected to a specific objective or initiative associated with the current strategic plan.

Visibility

Objective: Invest in marketing expertise – evaluation of marketing effectiveness, improve strategies for recruitment

Objective: Develop marketing focus

- Coordinate with VP Tim Bryan and team and deans regarding promotion of academic majors and other academic programming.

Viability

Objective: Diversify and increase revenue – improve strategies for recruiting and retaining students with various modes of delivery to increase net revenue

- Monitor LMS conversion process for new online learning platform using Moodle Modules.

Objective: Diversify and increase revenue – develop plan to review and project net tuition dollars for each program; analyze contribution margins and review profitability

- Analyze and implement part 2 of “Academic Cost Containment Proposal” – review targeted majors listed in proposal, streamline identified programs with high costs, consider elimination or modification of specific “minors” and/or other programming.

Objective: Optimize return on investment – implement at least one new market-driven and one revised program or major each year

- In collaboration with VP Tim Bryan and others, identify potential new majors, institutional resources, and timeline, for launch of new or revised majors or programs over next five years.

Objective: Optimize return on investment – develop an appropriate plan for identifying unproductive or obsolete programs

- Follow-up on specifics and finalization of part 1 of “Academic Cost Containment Proposal” – program eliminations and associated reductions.
- Analyze and implement part 2 of “Academic Cost Containment Proposal” – review targeted majors listed in proposal, streamline identified programs with high costs, consider elimination or modification of specific “minors” and/or other programming.

Objective: Optimize return on investment – develop initiatives that retain students and increase completion rates

- Propose and implement part 3 of “Academic Cost Containment Proposal” – General Education program review, reductions, and improved efficiencies.
- Explore “learning commons” options for integration of library, tutoring spaces, and writing center.

Objective: Strengthen infrastructure – develop a plan for maximizing facilities, technology, personnel, and systemic structures

- Monitor LMS conversion process for new online learning platform using Moodle Modules.
- Identify faculty position replacement needs and priorities and conduct appropriate searches.

Vibrancy

Objective: Advance learning outcomes – students will successfully complete their chose course of study

- Propose and implement part 3 of “Academic Cost Containment Proposal” – General Education program review, reductions, and improved efficiencies.

- Explore “learning commons” options for integration of library, tutoring spaces, and writing center.

Objective: Align resources with priorities – strengthen existing academic and support programs that leverage Malone’s distinctive institutional strengths

- Identify faculty position replacement needs and priorities and conduct appropriate searches.
- Analyze and implement part 2 of “Academic Cost Containment Proposal” – review targeted majors listed in proposal, streamline identified programs with high costs, consider elimination or modification of specific “minors” and/or other programming.
- Review with deans and others part 4 of “Academic Cost Containment Proposal” – other synergies and efficiencies to consider.
- Work with VP Tim Bryan, VP Joy Brathwaite, and other administrative offices on technical aspects of setting up internal structures and processes for new programming.

Objective: Align resources with priorities – create and implement professional development activities for all categories of employees

- Develop and implement robust adjunct, part-time, and clinical faculty orientation and professional development plan.
- Update definitions and policies and propose revisions to Promotion and Tenure Committee for review by faculty, approval by BOT, and inclusion in updated faculty handbook.
- Monitor implementation of new process, membership, and structure for Promotion and Tenure Committee.
- Develop process and procedures, and seek final faculty and BOT approval, for non-tenure appointments and promotion without tenure.

Objective: Building student-centered culture – enhance programs and activities that prepare students for transition into post-college life

- Explore “learning commons” options for integration of library, tutoring spaces, and writing center.

Other Priorities

- HLC follow up regarding updates and implementation of strategic plan
- Implement HLC Assurance System process and implementation of Pathways, document uploads and updating
- Work with deans to find ways to maintain faculty morale and hope in the midst of difficult context.

Tim Bryan – Marketing and University Communications

Visibility

(enhance institutional identity and increase awareness of Malone University among target constituent groups)

- a. Integrate key messages into marketing efforts across all audiences. Communication audit to evaluate success of implementation.
- b. Increase media coverage beyond primary market, measured in column inches and electronic media placements.
- c. Increase traffic to all Malone University web platforms, measured in unique visitors, page views, and visitor engagement.
- d. Establish and implement new advertising strategies and campaigns, measured in inquiries, applications and matriculated students, traditional, degree completion, and graduate.
- e. Work collaboratively with campus personnel to expand summer academic outreach initiatives, grow programs in number from one to four with a minimum of 15 students per program.
- f. Establish and execute communication tactics which highlight the strength of the academic program. Communication audit and interviews with Provost and Deans to evaluate the success of the implementation.

Viability

(position Malone University to optimize return in revenue generating operations)

- a. Transform marketing of MMP program to drive inquiries, applications, and matriculated students, measured in net tuition revenue.
- b. Enhance secondary market and out of state recruiting through targeted marketing efforts for traditional students, measured in net tuition revenue.
- c. Establish and execute communication flow for Malone Fund solicitation programs, measured in attainment.
- d. Execute strategies which attract increased interest students from affluent communities in primary, secondary, and tertiary markets, measured in inquiries, applications, matriculated students and reduction in the discount rate.
- e. Execute strategies which attract increased interest students from faith based, private high schools in primary, secondary, and tertiary markets, measured in inquiries, applications, matriculated students and reduction in the discount rate.
- f. Establish and execute marketing and re-recruitment campaigns for returning students and parents, measured in enhanced retention.
- g. Work collaboratively with Advancement staff to conceptualize and create case statement and marketing materials for campaign, measured in donor and alumni engagement in response to readiness interviews.

Vibrancy

(enhance the awareness of the transformative nature of our academic environment and institutional commitment to the spiritual growth of students)

- a. Highlight initiatives and programs which foster the intellectual and spiritual growth of students, measured in weekly review of communication efforts focused on this benchmark.
- b. Conceptualize and execute communication initiatives which establish an awareness of outcomes associated with earning a Malone degree, measured in weekly review of efforts focused on this benchmark.
- c. Conceptualize and execute communication efforts which highlight Malone students' participation in service, study away, research, and spiritual formation opportunities, measured in weekly review of efforts focused on this benchmark.
- d. Demonstrate the commitment to teaching and holistic education on the part of Malone faculty through the use of internal and external media placements, web based content and video generation. Write, edit and produce at least one feature on a Malone faculty member each week for use in select communication media. Measured in weekly review of efforts focused on this benchmark.

Melody Scott – Student Development

The Office of Student Development exists to invite and involve students into a **vibrant student-centered community** which represents a wide range of backgrounds, experiences and viewpoints. This will enhance students' educational experience and inform their worldview as they transition to and from the University by providing essential resources, services, programs and activities necessary for their holistic development.

VISIBILITY

TRANSFORM MARKETING MATERIALS

- Execute strategies in collaboration with Admissions to provide stronger communication efforts to prospective students highlighting student life and residence life opportunities.

INCREASE INTERCULTURAL PRESENCE AND AWARENESS ON CAMPUS

FY 15 TARGET:

- Promote SmartStart program: Move toward a 1% increase in retaining underrepresented students through SmartStart program.
- 'Attract New Talent' - Forge scholarship opportunity to advance learning, scholarship and service among underrepresented students in conjunction with Advancement Office.
- Foster new and increased partnerships between Malone and outside constituents to support the goals of the Multicultural Services office (i.e., determine specific targets for partnership possibilities).
- Brenda Stevens will continue to implement the Brown Bag Luncheon Series; our goal is to achieve attendance of 10 faculty or staff members who have never participated.
- Collaborate with Cross Cultural Center for Engagement to increase applications to service-learning trips by 25 more students.

VIABILITY

ESTABLISH AND EXECUTE STRATEGIES WHICH WILL OPTIMIZE RESIDENCE HALL SPACE AND RETURN IN REVENUE

FY 15 TARGET:

- Work with Stark State in providing rooms to students
- Highlight programs and initiatives for commuter population which foster campus involvement
- Commuter population (commuters to residents); establish a program review cycle on commuter population integration on campus.

CREATE DATA-DRIVEN ASSESSMENTS AND PROGRAM REVIEW CYCLES WITHIN DIVISIONS

- Each division within Student Development will execute strategies in attracting increased interest and returning campaigns for returner students based on data-driven assessment and program reviews. This involves review and benchmark best practice for current programs in SAC, Residence Life and Multicultural Services for alignment of the goal of developing the whole student.
- Each division will adopt a financial plan to support a fully prioritized version of the Strategic Plan.

STRONGER COLLABORATION TO CREATE AN ALIGNMENT OF RESOURCES

- Collaborating within specific divisions in order to align resources particularly for outside speakers. (Res. Life is making sure that RAs support Life Groups, SAC events, & Multicultural programs as part of their curriculum w/RAs.)

VIBRANCY:

ENHANCE COMMUNITY INVOLVEMENT

FY 15 TARGET: Adopt and implement a review process for SAC activities. Create a culture of involvement on weekends through refining SAC co-curricular activities; SAC will shift all activities from week days to weekends. Establish a goal of regular assessments to gather data on the number of students who attend as well as whether a variety of students attend and review whether we are reaching goal of developing the whole student.

PROVIDE SERVICES & ACTIVITIES THAT ENCOURAGE PERSONAL WELLNESS/HOLISTIC DEVELOPMENT

FY 15 TARGET:

- 2013-14 survey of our counseling center showed that a number of participants did not know how to access our counseling center. A timeline is being established for repeated advertisement of our counseling center to all students through various mediums as well as communicating the variety of counselors available. The location of the counseling center is not conducive to privacy needs so ways to provide further physical privacy of the actual space are being examined.
- Participate in formal academic research with Ohio Domestic Violence Network to implement educational programs for relationship violence (initiative in responding to Cleary Act).

DEVELOP LEADERSHIP OPPORTUNITIES

FY 15 TARGET: RDs will establish a leadership development curriculum for RAs, and it will be implemented in their required corporate, bi-monthly community development meetings, and continue their established program review cycle.

FOSTER INTERPERSONAL SKILLS AND PROVIDE OPPORTUNITIES FOR SPIRITUAL GROWTH

FY 15 TARGET:

- Spiritual Formation Office will provide over 400 initiatives to students for spiritual formation credit.
- 100% of the Residence Life staff will be involved in facilitating or attending life groups in collaboration with the Spiritual Formation Office and implement program review cycle.
- Encourage various departments on campus to consider student internships.

PROVIDE OPPORTUNITIES FOR CIVIC ENGAGEMENT

FY 15 TARGET: Residence Life will establish two floors as civic engagement living-learning communities in collaboration with the Social Work Department. Students that participate will be involved in civic engagement (experiential activism) in Canton, listen to external leaders involved in local service work, and participate in a life group designed to address topics of the local and global community. They will implement a program review cycle.

ENCOURAGE RESPONSIBILITY FOR STEWARDSHIP

FY 15 TARGET: Evaluate needs and set priorities for maintaining and upgrading existing residence hall facilities and infrastructure consistent with our commitment to environmental sustainability.

- Assess physical resource needs as part of the plan's implementation.
- Address priority needs that can be financed with existing resources.
- Address priority needs that require new resources.
- Construct a physical environment in our residence halls that will shine as student-centered community (renovate student lounge space in residence halls).

FY 15 Student Body Target: Two RDs have collaborated with faculty and students to establish a sustainability organization. Each semester they will implement one program to raise awareness on campus about stewardship issues as members of a global community and implement a program review cycle.

ENGAGE IN REVIEW OF STUDENT DEVELOPMENT INTERNAL & EXTERNAL COMMUNICATION MATERIALS

FY 15 Target:

- Review and revise internal communications provided through Student Development
- Review and update student handbook (aligning current federal and state regulations);; Continue ongoing full use of SSI to implement necessary changes in Student Development.
- Collaborating with University Relations for parent newsletters; Convene an ad hoc committee for review of Title IX and other federal regulation implementation.
- Communicate and addressing safety concerns for parents of current & prospective students through PioneerShield App.

Stephen Weingart – Office for Advancement

- Increase Revenue

Goal	FY15 Target	FY14 Result	FY13 Result
TMF	\$1,050,000	\$910,000	\$790,000
Total Giving - \$2.5M	\$2,500,000	\$2,100,000	\$2,115,000

Increase Major Donor Pool	FY15 Target	FY14 Result	FY13 Result
Founder's (\$10k+)	42	36	32
Ambassador's (\$5k - \$9,999)	37	32	27
Chairman's (\$2.5k - \$4,999)	50	40	47
President's (\$1k - \$2,499)	175	136	155
Total President's Club+	304	244	261

Increase Total # of Donors	FY15 Target	FY14 Result	FY13 Result
Total # of Donors	3,500	2,809	3,458
Alumni Donors	1,650	1,599	1,387

- Individual & Team Goals for Development Officer (DO) Staff via new monthly scorecard. The scorecard will measure the following:
 - Revenue by category (TMF, Restricted, Estate, Sponsorship)
 - Increase Major Donor Pipeline (see goals above)
 - Increase Contacts and Visits by DO staff
 - Increase proposals by DO staff
- Successfully Launch Campaign
 - Readiness Study complete by 12/15/14
 - Board approval February 14, 2015
 - Capital Campaigns Committee Presentation – March, 2015
- Improve effectiveness & efficiency of processes & activities
 - Leverage RaisersEdge through process improvement and implementations
 - Implement Best Practices

David King – Office of the President

September 5, 2014 - V2

1. *Visibility, Viability, Vibrance*: Lead the University's efforts to develop the case statement for the capital campaign and lead the efforts of the Board of Trustees, the Advancement staff and the University community to advance and accomplish the objectives of the campaign. This will include closely monitoring the University's Advancement efforts to ensure annual unrestricted goals are met (i.e. The Malone Fund, Malone Sports Network, other), Trustee giving continues to increase and overall giving continues to increase. This is expected to require in excess of 50% of the president's time. (A key touch point in FY15 will be a March 2015 presentation to the Stark Community Foundation Committee.)
2. *Visibility, Viability, Vibrance*: Articulate and advance the themes, objectives and priorities of the Strategic Plan. Periodically revisit the Strategic Plan and exercise vigilance with respect to the emerging conditions and opportunities to which the University should respond that may not be included in the Strategic Plan. This will include developing, closely monitoring and responding to three sets of KPIs and Dashboards (i.e. Collegium, Board of Trustees and campus community).
3. *Visibility, Viability*: Oversee the University's multi-pronged strategy to increase revenue. (i.e. net tuition revenue, non-tuition revenue, fund raising; note also February 2014 Board Directives)
4. *Visibility, Viability*: Lead and closely monitor the University's undergraduate, graduate and adult professional studies enrollment activities to insure 2014-2015 enrollment results align with / exceed projections and budget.
5. *Viability*: Sustain as a priority the campus community's assessment and monitoring of all aspects of expense management toward current FY YrEnd targets, established 3 – 5 year budget projections, and key ratios (i.e. US DOE). (i.e. current FY expense management as well as expense reduction initiatives articulated in the February 2014 Board Directives – program review and reductions, sustainable faculty / student ratios, etc.)
6. *Visibility*: In collaboration with the Governance Committee of the Board of Trustees and the General Superintendent of EFC-ER, identify and cultivate prospects for Board service who reflect progress toward the Board's stated aspirational "Board profile".
7. Maintain a consistent pattern of self-care including daily quiet time (i.e. scripture, reading, prayer and reflection), exercise, and time away which is dedicated largely to rest, renewal, reflection and planning.