



## **2015-2016 Strategic Plan Update Report**

### **Assessment of Institutional Effectiveness**

Prepared by

Strategic Plan Review Committee

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## Introduction

During the 2014-2015 academic year a steering committee of faculty, staff, administrators, students, alumni, and trustees were brought together to develop a new strategic plan. The mission and core values were reviewed, a new vision emerged from the campus dialogues, and the plan was unveiled to the community at the fall opening day ceremony - *The Strategic Plan 2015-2020: Scholarship, Partnership, and Leadership for a Changing World*. It was approved by the Board of Trustees at their October 2015 meeting.

In fall 2015, \$423,455 were set aside to “kick-start” initiatives that supported the new plan (Strategic Plan Implementation Funds - SPIF). Proposals were due in November, 2015, (43 proposals were submitted) and were reviewed by a committee made up of volunteers from the strategic plan steering committee and representatives of each division. SPIF review committee recommendations were submitted to the president’s direct reports group for final selection. Proposals were evaluated based on their support of the strategic plan goals and cross-divisional collaboration. Thirteen proposals were funded, for a total of \$371, 586.50. Interim reports were due April, 2015, October, 2015, and April, 2016. The final reports are due in September, 2016. Information from these interim reports are included in the divisional updates where appropriate. See Appendix A for details and Google site for proposals, <https://sites.google.com/a/worcester.edu/sprc---strategic-plan-review-committee/>.

## Institutional Effectiveness

Institutional effectiveness is “... the degree to which institutions can harness their resources to achieve their objectives [and] depends upon the ... institution’s willingness to set priorities and solve its problems” (American Council on Education, 2016). Campus climate and academic excellence are always in the forefront of campus operations, but this year were identified specifically for attention across the university. Even though the priorities were named late in the year, February, the divisions were able to support both in their updates to the Strategic Plan Review Committee (SPRC). The divisional reviews provide documentation for the university’s progress on the strategic plan and our effectiveness as an institution.

Two areas of focus were identified as of special interest in the divisional reviews: Campus Climate, a presidential initiative, and Academic Excellence. These two areas are part of the university mission:

*Worcester State University champions academic excellence in a diverse, student-centered environment that fosters scholarship, creativity, and global awareness. A Worcester State education equips students with knowledge and skills necessary for lives of professional accomplishment, engaged citizenship, and intellectual growth.*

They are part of the institutional core values:

- **Academic Excellence:** We are committed to providing opportunities to excel in a close-knit learning environment characterized by distinguished faculty, excellent teaching, and creative linkages between classroom learning and real-world experiences.
- **Engaged Citizenship:** We are committed to promoting community service, social justice, the democratic process, environmental sustainability, and global awareness to prepare students to be active and informed citizens.
- **Open Exchange of Ideas:** We are committed to inviting and considering the most expansive range of perspectives in teaching and learning, in scholarly and creative work, and in the governance of a complex, diverse institution.
- **Diversity and Inclusiveness:** We are committed to being an inclusive community in which our diversity enhances learning for all and in which people from all cultures and backgrounds have the opportunity to participate fully and succeed.
- **Civility and Integrity:** We are committed to respecting the dignity of all members of our community and to demonstrating this commitment in our interactions, decisions, and structures.

They are also represented by goals 1 and 4 of the strategic plan:

1. **Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation**
2. Leverage WSU's distinctive strengths, both to enhance the University's reputation and to prepare students to lead, serve, and make a difference in the world
3. Attract and enroll a diverse pool of highly motivated students and attach institution-wide priority to promoting their retention and success
4. **Cultivate a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered, and valued**
5. Promote financial strength and organizational sustainability while continuing to secure and invest the resources required to maintain WSU's reputation for excellence and value

The following report has five main sections: 1) recommendations, 2) support of focus areas and institutional goals, 3) divisional action plans and evaluation, 4) location of all divisional reports, and 5) updates on NEASC projections for the period up through spring 2016.

In section one the committee makes overall recommendations based on findings from the divisional updates. Section two contains the evaluation of progress on the areas of focus and strategic plan goals. Discussion draws on the information presented in the divisional executive summaries, update sessions, and divisional action plans that support a particular area or goal. Section three contains the divisional evaluations along with their executive summaries. Section four has been moved to a Google site, <https://sites.google.com/a/worcester.edu/sprc---strategic-plan-review-committee/>, where all of the documents relating to the strategic plan and review are stored. Divisional action plans will be found at this site. Section five contains an update on the NEASC self-study projections that had a completion date up to spring 2016. The table is also on the Google site. Use the link above to access the site.

## Recommendations

SPRC has a comprehensive overview of the work done each year on the strategic plan. Based on our “30,000 foot view”, we would like to recommend the following:

### 1. Pre-planning –

#### a. We suggest two possible scenarios for the timing of the selection of areas of focus:

- i. Identification by the end of the fall academic semester for the current academic year. The upcoming budget process would be aligned with the priorities identified. The budget process begins in March with an April/May determination of financial priorities. If university areas of focus are identified before the budget process begins, then divisional and fiscal priorities can be aligned. Current practice has these out of sequence.

Pro: Discussions during the current year for the areas of focus, budget alignment.

Con: Not enough time to strategize specifically for the areas of focus identified.

- ii. Identification in September for the next academic year. This timeline would allow time for planning within the divisions and the university as a whole on how to address the areas of focus.

Pro: Allows ample time to strategize initiatives that support the areas of focus identified.

Con: Might be too far ahead so focus is lost.

### 2. Cross-divisional, cross-university collaboration and communication –

- a. SPRC is the only group on campus with an overview of divisional activities. The updates could be shared at direct reports meetings. A special session of the President’s Direct Reports should be devoted to sharing best practices on working with the university strategic plan. Two divisions, Enrollment Management and Student Affairs, have comprehensive, inclusive action plans that could serve as a model for the other divisions. Devise a way to embed “sharing best practices” across divisions as well as across campus. Each area has strengths that could be shared with others.
- b. Establish a campus-wide event where the progress on the strategic plan is shared with the campus community. Transparency of progress would keep the strategic plan vital within the campus community.
- c. Establish a reward structure that recognizes cross-collaboration and reinforces a “culture of positivity”. (The reward does not have to be monetary or released time.) Recognition should be done in a meaningful way, identifying who is making a difference, being sure to “spread the wealth” and not focus on the same groups over and over.
- d. Implement a monthly Campus Coffee Break on the model used by Dean Larrivee. The Worcester State Coffee Break is an opportunity for the staff and faculty to come together in a social setting for a short period of time each month. The conversations could be targeted or open, providing an opportunity for people to gather with different groups on campus. If the idea is accepted, the ground rules should be clearly defined that this is not a “gripe session”. Please see Addendum B for a possible outline.

3. Develop metrics that provide meaningful data –
  - a. Metrics can be qualitative as well as quantitative. Surveys have the ability to generate both types of data. Establish baseline data in order to benchmark progress. Survey different constituents, have focus groups to drill down on specific issues. We have experts in all types of data analysis across campus. Classes could be used to develop surveys, graduate assistants could coordinate focus groups, etc.
  - b. Respectfully, “ongoing” is not an acceptable outcome.
  - c. This is a persistent issue, highlighted in the 2014 report.
    - i. *One trend that needs to be supported throughout the year is how to analyze data. Analysis and evaluation requires more time for divisional and cross-divisional development and discussion. Multiple measures are also needed, including qualitative and quantitative data and analysis. Bringing this discussion into the normal work flow will take vigilance by the campus leadership teams.*
    - ii. *Cabinet would provide a forum to discuss and evaluate data and should be utilized in this way throughout the year. Due to the history of working mainly within one’s own division, there may be concern about sharing a problem or asking for assistance. Trust can be developed in an open and respectful environment where all are working for the good of the university.*

## Institutional Assessment and Evaluation

Commentary and discussion of progress on the area of focus is presented In Section Two. Since the strategic plan is a comprehensive document, and is representative of the entire university, results have been combined here from all divisions based on their executive summaries and session discussions with SPRC.

SPRC evaluation is based on the executive summaries, update session discussions, and action plans. The focus is on the current year, and the committee also looked at previous reports for progress on any recommendations made in previous years.

### Definition of Evaluation Results

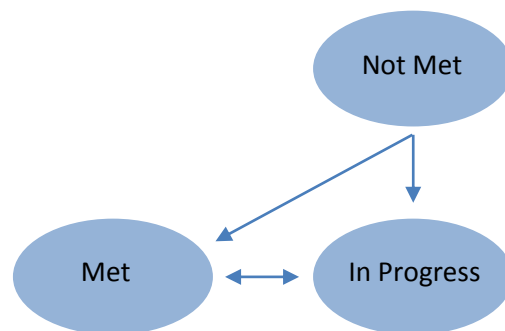
The committee uses the phrases “Met”, “In Progress”, and “Not Met” for the results of each evaluation area. SPRC evaluations are limited to the past year only, and we encourage all divisions to take advantage of this assessment time frame to take on larger and farther reaching goals as they learn from their initiatives from previous years.

No division should consider themselves finished in terms of integrating the university goals and strategic plan even if all evaluation results are “Met”. Because growth is cyclical, movement from “Met” to “In Progress” should be expected as divisions move from basic initiatives to more complicated and long-term initiatives that bring the division closer in line with the Strategic Plan.

“Met” means that the division has presented meaningful data showing the outcome of initiatives for this criteria. We challenge divisions who have “Met” in most or all areas to use their solid foundation to create further reaching goals and initiatives for the next assessment period, and to collaborate with other divisions to share best practices.

“In Progress” means that the division presented clearly defined goals and a solid action plan with initiatives that are still ongoing. We encourage divisions with “In Progress” results to continue their efforts and create a timeline for completion to keep themselves accountable. These divisions should also focus on meaningful longitudinal data collection so that they can evaluate the success of ongoing initiatives and create a solid assessment foundation for future goal setting.

“Not Met” means that the division has taken no action in this area this year. We encourage divisions with these results to set well defined goals and implement them over the next year. These divisions should network with other divisions to learn best practices so they can build a solid foundation for future initiatives. We see this as an excellent opportunity to integrate cross-divisional collaboration into a division’s foundation for planning and assessment.





The divisions had already developed their initiatives and action steps for the year, but most have been able to highlight specific areas where they support campus climate and academic excellence.

### **Area of Focus - Campus Climate**

In this year of the Black Lives Matter movement, the campus has identified a special focus on diversity and campus climate. The president brought together a group of faculty and staff to open dialog on campus on diversity issues. As a result *campus climate* was identified for specific focus of the strategic plan review. Campus climate involves, but is not limited to, diversity issues, communication, respectful interactions, customer service, etc. As a core institutional value, campus climate is implicit in the divisional action plans.

### **Status**

**The focus on Campus Climate is [met](#) for this year.**

Evaluation of this area of focus is limited due since this was identified late in the academic year. Each division has implicit in their initiatives and action step items that support an inclusive, welcoming environment and have discussed in the [executive narratives](#).

### **Discussion**

Administration and Finance focused on “service and support of the WSU [community](#).” They are establishing baseline data through surveys of various campus groups. Enrollment Management “encourages all members of the campus to be included in campus activities, decision-making processes, and [outcomes](#)” to support the campus. Student Affairs has made a “commitment to training on topics of diversity as it relates to social justice, inclusive workspace, and engagement of our [student body](#).” University Advancement supports “a vibrant campus life and collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered and [valued](#).”

See the individual [executive summaries](#) for more complete discussion of campus climate.

### **Recommendation**

Areas of focus should be identified prior to budget planning for the following year. Identifying the specific focus of the strategic plan for the coming year allows divisions to prioritize their action plans as well as develop their budgets accordingly. Divisions have their annual retreats in the late spring and summer months so making them aware of the coming focus should be timelier. See overall [recommendations](#) for two possible scenarios.

## Area of Focus – Academic Excellence & Goal 1

**Enhance the undergraduate academic program and expand graduate programs in a community of learning that promotes academic excellence and innovation.**

### Status

**The goal of promoting academic excellence is [met](#) for this year.**

### Discussion

Academic excellence is at the heart of the university as demonstrated in the mission statement, “... to champion academic excellence in a diverse, student-centered environment”. All 13 SPIF grants focused on academic excellence and each division contributes to support our effectiveness.

Administration and Finance has streamlined the process for tuition payment “in an effort to serve students better and increase retention and graduation [rates](#).” Enrollment management’s “work is designed to enhance students’ interaction with academics through promotion, recruitment, registration, and [more](#).” Student Affairs supports academic excellence through non-classroom activities such as service learning and community [service](#). Students see the interface of their academic work with real world experiences. University Advancement supports students with various [scholarships](#) that enable them to continue their studies.

See the individual [divisional summaries](#) for more complete discussion of academic excellence.

### Overall Impressions

This first assessment of the new strategic plan is much improved over the previous sessions, showing growth and understanding of the process of planning and evaluation. The discussions have become lively interactions between SPRC and the divisional vice presidents, sparking new ideas and alternative ways to see an issue and create a solution. The process was tweaked slightly this year, requesting an executive summary of the progress of the entire division on the focus areas and any goals that the area Dean and VPs wanted to highlight. In previous years, each division reported by department, showcasing individual successes.

### Recommendation

The campus would benefit greatly from a campus-wide discussion of the progress on the strategic plan. The development process was transparent, reaching all campus groups multiple times. Their input was valued and is represented in the strategic plan. The evaluation and update process is insular. Only the SPRC members and the president’s direct report group have access to the final document. The president will provide a summary of progress to the Board of Trustees in June. As of today, there are no plans to celebrate the progress on the strategic plan with the wider campus communities.

The SPRC has an excellent overview of the campus and can see the collective progress on the strategic plan. The committee is also aware of areas where improvement is needed. If the report is read and shared with a wider audience, more of the campus will understand the great work that is accomplished

all across the university. Keeping the essence of the report insular leads to loss of interest in strategic planning as a whole, and may hinder the development of the next plan. We promised transparency – we need to fulfill that promise.

## Administrative Assessment Review by Division

In this section are the individual divisional evaluations. These have been prepared by members of the strategic plan oversight committee based on the information provided in the divisional executive summaries, discussions, and action plans, and are based on the review template categories.

### Academic Affairs

Evaluation	Results
<b>Focus area: Campus Climate</b>	Not Discussed
<b>Focus area: Academic Excellence</b>	In Progress
<b><u>Divisional Objectives</u></b> Included Cross-Divisional Collaboration	In Progress
<b><u>Analysis of Effectiveness</u></b> Appropriate Analysis Conducted for Each Objective Evidence of Critical Evaluation of Division's Effectiveness Relative to the Objectives Clear Analysis-Driven Recommendations for Future Implementation	In Progress
<b><u>Supporting Documentation</u></b> Sufficient Information/Evidence to Understand Analysis	In Progress

### Summary of Process

Academic Affairs provided the committee with an initial assessment plan that covers the next year. We look forward to seeing the results of this plan at the update session in 2017. An executive summary was requested of all divisions, but has not been submitted by academic affairs as of this report. If the executive summary is provided at a later date, it should be added in the next session.

### Strengths

The SPIF grant *"The ALANA initiative: Expanding and enriching curricula and community for ALANA and all students at WSU"*, succeeded in implementing an Interdisciplinary Concentration in Ethnic Studies which was approved by Governance in February 2016. A cross-departmental and cross-divisional working group of faculty and staff from the Office of Multicultural Affairs and Enrollment Management worked to cultivate increased racial and ethnic diversity among students, faculty, alumni, and the campus community.

### Recommendations

Moving forward, Academic Affairs should create overarching divisional goals to unify the focus of the departments within Academic Affairs and further integrate the strategic plan into the function and communication of the division. We recommend that the action plan provided be implemented

immediately to begin the process of collecting and assessing longitudinal data to aid in information based decisions.

## Administration and Finance

<b>Evaluation</b>	<b>Results</b>
<b>Focus area: Campus Climate</b>	Met
<b>Focus area: Academic Excellence</b>	Met
<b><u>Divisional Objectives</u></b> Included Cross-Divisional Collaboration	Met
<b><u>Analysis of Effectiveness</u></b> Appropriate Analysis Conducted for Each Objective Evidence of Critical Evaluation of Division's Effectiveness Relative to the Objectives Clear Analysis-Driven Recommendations for Future Implementation	Met
<b><u>Supporting Documentation</u></b> Sufficient Information/Evidence to Understand Analysis	Met

### Summary of Process

Administration and Finance planned projects to move the University towards a more customer-focused experience. The division gathered data from a series of surveys of faculty and staff about specific departments. SPRC looks forward to analysis based on the data from these surveys. It will be important to maintain baseline data and to think strategically in order for Administration and Finance to determine the impact of any upgrades and changes. The division will be implementing Elevate™ as a system to facilitate the collection and use of data and plans, and will share their results with other offices and divisions on campus. Elevate™ is a data collection and analysis tool that part of Colleague.

### Strengths

The Bursar and Enrollment Management have been successful in bringing the number of nonpayment holds down over the last few academic years. The success of resolving student nonpayment holds impacts student retention at the university and increases on time (within 4-6 years) graduation rates.

Administration and Finance collected data through pre- and post-surveys for departments in the division and supplied aggregated data to the committee.

### Recommendations

Administration and Finance could survey the student body specifically about the students' experiences related to the billing process. Useful data could include the evaluation and assessment of all departments in the division, allowing the division to make information-based decisions on how to enact change. Administration and Finance could then share their best practices with the university.

A procedurally literate student body would enhance the impact of any projects Administration and Finance initiates in the areas of customer service. An educational component could improve student

comprehension of billing processes and timelines, and increase student understanding of the educational and financial impact of academic choices, such as dropping courses, repeating courses, and taking a combination of evening and day courses.

Charting data will help clarify the division's progress as it relates to the university strategic goals. We encourage follow through with the analysis of the pre and post-surveys, and suggest that appropriate adjustments be made to future surveys to increase the accuracy and functionality of the survey data. This assessment process should be applied to other projects as well, such as the pilot project using ImageNow™ to track paperwork as it moves through the approval process.

## Enrollment Management

<b>Evaluation</b>	<b>Results</b>
<b>Focus area: Campus Climate</b>	Met
<b>Focus area: Academic Excellence</b>	Met
<b><u>Divisional Objectives</u></b> Included Cross-Divisional Collaboration	Met
<b><u>Analysis of Effectiveness</u></b> Appropriate Analysis Conducted for Each Objective Evidence of Critical Evaluation of Division's Effectiveness Relative to the Objectives Clear Analysis-Driven Recommendations for Future Implementation	Met
<b><u>Supporting Documentation</u></b> Sufficient Information/Evidence to Understand Analysis	Met

### Summary of Process

Enrollment Management provided a clear organizational plan and transparency of the processes used in evaluating their action plan. The divisional plan is inclusive of all departments within Enrollment Management. Each department has individual goals which tie directly to the divisional action plan, thus to the University strategic plan. The committee views the Enrollment Management method as a model process on strategic plan methods.

### Strengths

Enrollment Management maintained strong communication with the committee throughout the review process and answered the committee's follow-up questions thoroughly and in a timely manner. Their goals are well organized and easy to understand.

The division took SPOC's 2014 recommendations into consideration. The divisional objectives and key strategies/initiatives are clearly linked to the University Strategic Plan and the institutional goals. In the 2014 report, SPOC recommended that the Enrollment Management divisional action plan be more comprehensive in representing the entire division. The 2016 plan includes goals and actions that span the multiple departments within the division.

Enrollment Management has done a commendable job supporting the university's core value of academic excellence. Enrollment Management purchased a new piece of catalog and governance software and worked to improve the university recruitment materials and website. They have successfully continued the implementation and use of the Admitted Student Questionnaire and the analysis of the resulting data.



SPRC also recognizes Enrollment Management's devotion to campus climate. The division worked internally and cross-divisionally to improve the climate of Worcester State University by providing customer service training for all Enrollment Management employees, participating in diversity and inclusion workshops and offering cross-divisional bi-monthly Information Sharing Sessions. Enrollment Management's future plans include offering civility training to all EM employees, creating an annual award for superior customer service and reconfiguring of Financial Aid office space.

## **Recommendations**

SPRC recognizes the initial efforts made by the Division of Enrollment Management to align academic programs with workforce information. The Committee recommends further action based on collaborations with Career Services and University Advancement. The current data and information populating these webpages is a valiant first step in the process of establishing this type of recruitment tool and informational resource. To take this endeavor to the next level, it would be beneficial to note more specific and real-time data related to employment trends, projections, education requirements (e.g. Master's, Ph.D.) and base salaries. Working in tandem with Career Services and University Advancement would assist in the creation of these benchmarks and service many purposes across campus.

After the Financial Aid office is reconfigured and the team has completed customer service training, the division could create follow-up surveys with students and staff to see if the changes have helped improve the campus climate.

Enrollment Management has an excellent opportunity for cross-divisional collaboration. We recommend surveying other divisions to assess data needs that can be collected on admission or graduation. We also strongly encourage Enrollment Management to offer support to other divisions as they undergo their strategic plan assessment and planning.

## Student Affairs

<b>Evaluation</b>	<b>Results</b>
<b>Focus area: Campus Climate</b>	Met
<b>Focus area: Academic Excellence</b>	Met
<b><u>Divisional Objectives</u></b> Included Cross-Divisional Collaboration	Met
<b><u>Analysis of Effectiveness</u></b> Appropriate Analysis Conducted for Each Objective Evidence of Critical Evaluation of Division's Effectiveness Relative to the Objectives Clear Analysis-Driven Recommendations for Future Implementation	Met
<b><u>Supporting Documentation</u></b> Sufficient Information/Evidence to Understand Analysis	Met

### Summary of Process

Student Affairs provided well-articulated assessment goals that were interconnected across their departments as well as other divisions. Each initiative is intricately linked and thus supports all of the strategic plan goals. The department succeeded in meeting the goals of campus climate and academic excellence, and their plan shows a student-focused approach to meeting these goals.

### Strengths

The division paid close attention to the overarching goals of campus climate and academic success, especially in their collaborations with other offices and departments on campus. The actions for the strategies and initiatives are linked in such a way that the plans for any given goal will support the success of the other four goals.

Goals related to academic excellence were inclusive of accessibility needs and attended to the needs of at-risk students with barriers to persistence. The initiatives demonstrated a comprehensive focus on student success by meeting the needs of students from their undergraduate experience through their goals of post-graduation employment or graduate school.

Student Affairs has demonstrated excellent collaboration throughout the campus. Student involvement is critical to the success of the initiatives, involving them in the overarching goal of improving services to students and fostering a strong connection between students and the campus community. These initiatives are supported by plans to improve event planning across campus and using technology to improve communication throughout the university.

Student Affairs maintained strong communication with the committee throughout the review process, and its goals are well organized and easy to understand.

## **Recommendations**

We suggest that Student Affairs utilize specific action steps that will help keep them accountable and allow them to measure success. We encourage Student Affairs to continue their support of other divisions as they work on their action plans by sharing their best practices in initiative mapping across the goals of the strategic plan.

## University Advancement

Evaluation	Results
Focus area: Campus Climate	Met
Focus area: Academic Excellence	Met
<u>Divisional Objectives</u> Included Cross-Divisional Collaboration	Met
<u>Analysis of Effectiveness</u> Appropriate Analysis Conducted for Each Objective Evidence of Critical Evaluation of Division's Effectiveness Relative to the Objectives Clear Analysis-Driven Recommendations for Future Implementation	Met
<u>Supporting Documentation</u> Sufficient Information/Evidence to Understand Analysis	Met

### Summary Process

The office of University Advancement provided initial data on donor funded scholarships which have impacted student retention and graduation rates. These outcomes are important to track in order to increase funding and would foster cross divisional collaboration to meet strategic plan goals.

### Strengths

The division actively focused on campus climate, which is shown through their efforts to unite the campus community. These initiatives include WSU's Annual Day of Giving, Lifetime Lancer Student-Alumni Council, Adopt-a-Scholar program, and a new mascot.

University Advancement maintained strong communication with the committee throughout the review process. The division paid close attention to Academic Excellence and demonstrated the success of their initiatives with data. They provided the number of scholarships awarded in the fall 2015 semester and analyzed the effect of scholarship awards on WSU student retention and six-year graduation rates. University Advancement's partnership with Enrollment Management for the awarding of academic scholarships is an excellent example of cross-divisional collaboration.

University Advancement has benefitted from the Disney Model of Management, the details of which can be found in [Appendix C](#).

### Recommendations

We see an opportunity for University Advancement to collaborate with sister universities and become a state wide leader the standardization of terms, benchmarks, best practices, and goals. By establishing

baseline quantitative measures, future planning could be adjusted to serve both students and the University more effectively.

University Advancement has a strong relationship with Enrollment Management in the sharing of data around scholarships and retention. We recommend a longitudinal and long term data collection and analysis with an integration of qualitative data to support scholarship assessment.

The impact of the events calendar could be enhanced by instituting a shared event planning calendar for use in collaborative meetings with VP's, direct reports, etc. This calendar would be different from the university calendar posted on the website since it would include events in the pre-planning stage. This could streamline planning processes and improve cross divisional collaboration on events by networking them together during the event planning stage.

University Advancement has implemented best practices in Customer service and should consider offering workshops or trainings to other divisions.

## **Divisional Executive Summaries**

Each division was asked to provide both an executive summary of their work this year and updated action plan matrices. The summaries are included in this section; the action plan matrices and additional materials may be found on the Google Site established for the Strategic Plan Review Committee. Please use the link provided to access the Google site, <https://sites.google.com/a/worcester.edu/sprc---strategic-plan-review-committee/> .

### **Academic Affairs**

The executive summary of divisional progress has not been received as of the finalizing of this report.

## Administration and Finance

### Memorandum

**TO:** Strategic Plan Review Committee

**FROM:** Kathleen Eichelroth, Vice President of Administration and Finance



**RE: ADMINISTRATION AND FINANCE 2016 UPDATE**

**DATE:** April 28, 2016

#### AREAS OF FOCUS:

Cultivate a vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed included, respected, empowered and valued

Promote financial strength and organizational sustainability while continuing to secure and invest the resources required to maintain WSU's reputation for excellence and value

During the past year the focus in A&F has been on service and support of the WSU community. The overarching goals have been to collect data to form a baseline from which we would seek to improve and refine the ways in which we support campus constituents. A round of survey's were issued for each functional area and a second year of feedback is being collected. We will be evaluating the baseline survey data and comparing it to the second year results. We will devise a plan to actively respond to what the survey tells us with regard to the actual and perceived issues that rise to the top.

While we began the survey process, we also worked with IT in support of resources for the FY 2016 budget to fund technology replacement cycles, Colleague functional audits, and training services and expanded upgrades/new software to support the efficiency and effectiveness of university operations. Colleague conducted on site audits of the processes and use of software in various business units across campus. Procurement, Accounts Payable, Budget, Accounting, Bursar, Grants and Financial reporting were visited by a Colleague consultant who evaluated our business processes and provided staff with tools, tricks and pointers with regard to the most effective ways to process business activities. Progress was made on using Image now to automate the flow of documents across campus with a goal of eventually converting all university forms to an electronic routing process.

Also during this year we have been working with IT and DGCE to find a product that supports transparent reporting and current market attitudes towards continuing education and graduate program registration. The University has entered in to a contract to implement Elevate, which is a Colleague product that integrates with current registration and financial reporting modules. This

product is consumer friendly and provides a structure that supports financial accountability on a program level. Elevate is versatile and can be expanded for registration of fitness and recreational classes in the new fitness center, registration for training and development opportunities offered by Human Resources , in addition to any offering, fee based or free, for which we would encourage pre-registration.

In response to the first round of survey's, budget, procurement and accounts payable training sessions were upgraded and improved in an attempt for the information to be easier to understand and the purpose for policy and procedures to be communicated in a clearer fashion. In addition, the administrative policy sub-committee of Cabinet has re-convened with the intent of codifying current documented administrative practices into approved administrative policy. The group will also consider methods to effectively catalog and communicate administrative policy to the WSU community and make their recommendations to Cabinet.

Other areas of focus during the year included follow-up on the process for non-payment deletions in conjunction with the enrollment management team in an effort to serve students better and increase retention and graduation rates. We are rounding the corner to the completion of the Wellness Center building. The building provides new resources to the WSU community with expanded offerings in intramural and recreational programs. We anticipate a potential for new revenue generation when the facility offers programming to the general public. During 2016 an early retirement incentive was offered to employees as a cost saving measure. The success of this university initiative has provided for the re-distribution of resources from salaries to fund the increased costs to operate the new 100,000 square foot Wellness Center in FY 2017.

In the coming year we will continue with the initiatives that we have reported on, in addition to adding a new specific action under Goal #4 Community and Campus Life. The specific action is to "Implement Talent Management Plan" as detailed in the attached grids. The implementation of a talent management plan will touch on the following strategies under this goal: promote greater collaboration across divisions in support of shared, university-wide goals and mutual accountability for progress; nurture a campus culture that promotes cultural awareness and sensitivity as well as commitment to social responsibility and environmental stewardship; significantly improve internal communication and ensure faculty and staff feel they have a voice in setting strategic direction and priorities for the University; Celebrate contributions to campus and community by faculty, staff, students, and alumni who embody WSU's core values; and, ensure opportunities to succeed at WSU are equally available to all members of the faculty and staff.



## Enrollment Management



### 2015-2020 Strategic Plan Evaluation Enrollment Management Divisional Report March 9, 2016

#### Introduction

This report shall serve as evidence of the Enrollment Management Divisions update on the 2015-2020 Strategic Plan. This report is presented to the Strategic Plan Review Committee (SPRC) on March 9, 2016, in concert with verbal discussion of institutional goals, divisional priorities, and metric outcomes during the 2015-2016 academic year. Also included in this report are preliminary results of the Strategic Plan Incentive Fund (SPIF) Grants and NEASC Projections that were associated with the Enrollment Management Division.

In February 2016, it was announced that the areas of focus for this SPRC Review included Campus Climate and Academic Excellence. As Academic Excellence is engrained in the 2015-2020 Strategic Plan, documentation of the achievement of related goals is easily done. As Campus Climate is only eluded to in the 2015-2016 Strategic Plan, by such goals as Diversity and Inclusiveness and Civility and Integrity, the demonstrated achievement of this focus must be adapted from related priorities that the division had during this review period.

The Division of Enrollment Management is glad to provide this report and proud of the efforts made during this review period to support and meet the goals of the Worcester State University 2015-2020 Strategic Plan. Questions can be directed to Vice President Ryan Forsythe at 508-929-8498 or [rforsythe@worcester.edu](mailto:rforsythe@worcester.edu).

## **Campus Climate**

The mission of the Division of Enrollment Management (EM) and its primary functional body, the Enrollment Management Committee, is related to the bringing together of members of the WSU community to address issues of enrollment, retention, and graduation of all students. It is our core belief that positive recruitment, retention, and graduation outcomes are only possible on a campus with vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered, and valued.

From appreciating and celebrating the differences between all students, faculty, staff, and librarians to encouraging all members of the campus community to be included in campus activities, decision making processes, and outcomes, the Enrollment Management Division establishes strategic goals and other plans to encourage a campus climate which we all are proud of and benefit from. Examples of EM efforts to encourage progress towards a healthy campus climate can be seen in multiple strategic goals and outcomes. Specifically in the 2015-2016 academic year, the Enrollment Management Division is proud to have:

- Completed Customer Service training for all employees
- Participated in diversity and inclusion discussions and workshops for all divisional leaders
- Worked cross-divisionally to inform campus constituencies on divisional goings-on via bi-monthly Information Sharing Sessions
- Continued the collaborative and cross-divisional work of important committees, such as the Enrollment Management Committee, Transfer Advisory Board, etc.
- Enhanced communication of student, faculty, and staff success stories through the improved E- News website and other channels
- And more...

In future years, the Enrollment Management Division looks forward to:

- Furthering customer service and civility training for all employees
- Reconstructing the physical Financial Aid Office space to encourage improved interactions with staff
- Adding an annual award for superior customer service
- And more...

## **Academic Excellence**

Excellence in academics is the cornerstone of a post-secondary institution of higher learning. Enhancement of the undergraduate and graduate academic programs, through academic excellence and innovation, is essential to meeting the enrollment needs of an institution, among many other institutional priorities. It is because of this crucial need that the Enrollment Management Division is wholly embracing and supportive of the institutional goal of Academic Program and Excellence.

As the EM division does not deliver academic programs, our work is designed to enhance students' interaction with academics through promotion, recruitment, registration, and more. Goals and outcomes related to academics in EM often center on issues of program awareness, using registration data for program delivery and enhancements, enrolling appropriate numbers of students, etc.

Specifically in the 2015-2016 academic year, the Enrollment Management Division is proud to have:

- Improved recruitment materials, website, and video representation of academic programs
- Met data-informed Enrollment Management Plan Goals through cross-divisional work in the Enrollment Management Committee
- Administered the campus' first professional Admitted Student Questionnaire (ASQ)
- Capitalize on the promotion of HECCMA cross-registration opportunities
- Continue improvements to the Starfish Early Alert system for notifying students of progress in classes
- And more...

In future years, the Enrollment Management Division looks forward to:

- Creating a real-time data library for weekly enrollment comparisons by various measures
- Continue to meet data-informed Enrollment Management Plan Goals
- And more...

## **Goals, Strategies, Initiatives, Projections, and Analysis of Accomplishments**

### **Enrollment Management Metrics – Spring Update**

Please see the attached *Enrollment Management Metrics – Spring Update* for specific key strategies, initiatives, and actions established for the Enrollment Management Division. This document includes clearly articulated goals, evidence of cross-divisional collaboration, and clear actions that will be taken in future terms/years.

### **NEASC Projections from 2012 Self Study – Spring 2016 Update**

Attached is the *NEASC Projections from 2012 Self Study – Spring 2016 Update* document, which includes updates from the Enrollment Management Division for the current review period.

### **Enrollment Management Directors Goal Documents**

The 2016 goal documents for the Enrollment Management Directors of Admissions, Financial Aid, and Registrar are available for SPRC review. These documents reflect the expectations of the individuals in the Director positions, as well as the expectations of the offices which they oversee. Director and office goals are established based on the immediate needs of the division and the strategic plan goals and metrics.

### Strategic Plan Incentive Fund (SPIF) Updates

The three Strategic Plan Incentive Fund (SPIF) projects that are affiliated with the Enrollment Management Division are on track to meet their goals and have satisfactorily submitted their mid-year reports in late 2015. These projects include:

- The ALANA Initiative: Expanding and enriching curricula and community for ALANA and all students at WSU
- Study the Cultural Impact of Worcester State University...
- Urban Networks



**WORCESTER**  
STATE  
**UNIVERSITY**

### Annual Report on Strategic Planning

2015-2016

Division of Student Affairs

#### **Overview**

Comprised of 17 departments, the mission of Student Affairs is to promote and enrich students' education through a seamless learning environment that enhances the classroom learning experiences. This is fostered by interacting with students in their everyday lives through teaching, mentoring, advising, and counseling.

Student Affairs is an integral part of the learning process in higher education, providing opportunities for "student to learn through action, contemplation, reflection and emotional engagement as well as information acquisition (Learning Reconsidered)."

This past year, the work in Student Affairs focused on direct service to students, engagement, marketing of services, and a new Council for the Advancement of Standards (CAS) calendar for assessment. The numbers of students seeking services from departments like Counseling and Student Accessibility Services has jumped dramatically in recent years. The division faces significant challenges to meet all of the demands and needs of students without an increase to staff and working to prevent current staff burnout.

#### **Update on Assessment and Planning**

On October 16, 2015 the Student Affairs Division held a meeting of all the directors and associate/assistant directors to discuss the next steps for strategic planning. The goals of this retreat were to allow for an open and creative discussion between members of the division as it related to the University Strategic Plan and cross collaboration. Participants were asked to funnel concepts from departmental strategic plans towards the newly established divisional working groups. The three

working groups each headed by an Assistant Dean(s) are Student Engagement, Retention, and Marketing of Programs/Services.

The groups were tasked with the following:

- All initiatives must relate back to the five overarching goals and strategies
- Review all departments within the division for initiatives that relates back to the group topic. Groups can also develop new initiatives.
- Prepare action plan draft by December 18, 2015 and final plan by February 19, 2016. This plan should focus the work for the next year to 18 months.

Each group met and created action plans. For the first time, staff members were able to link action plans to divisional objectives, cross-divisional objectives and ultimately the institutional goals.

The below summary is a sample from the work of the three groups to address campus climate, cross-divisional work, and student engagement.

### **Student Engagement Working Group**

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to ***campus climate and/or cross-divisional work***?

- SPIF Funding- Civic Core: 14 ALANA Sophomore Students involving trips to Nicaragua, Dominican Republic and work with the City of Worcester Recreation program
- AY 15-16 Diversity Lecture Series, 4 in total
- Work with Reyes House. ENACTUS, Binienda Center
- CHIPS Program- Community health and improvement plan with Dean of Education, Health, and Natural Sciences
- Conduct Board representation by Faculty and staff in other divisions
- Coming Out Day and Transgender Day sponsored by Pride Alliance

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Limited Resources (budget limitations, transportation for students doing community work, staffing)
- Better Coordination of planning events (no double booking)
- Need a culture of collaboration
- Fiscal Policy Restraints (must wait until July 1 to book for next AY—timely planning)

- Lack of diversity among involved students

**Ongoing/future assessments:** In this section please describe **your groups' plans** moving forward. Did you come up with any new initiatives specific to your working group?

- Utilizing Noel Levitz Data to outreach to engage students
- Utilizing Alcohol EDU Data to outreach to engage students
- Comprehensive proposal for co-curricular transcript
- Work with institutional research on NESSE data

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **student engagement**?

- JumpStart
- Renovation of 3<sup>rd</sup> Floor of the Student Center
- 4-5 new student organizations this academic year

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Limited Resources
- Better Coordination of planning events (no double booking)
- Need a culture of collaboration
- Fiscal Policy Restraints (must wait until July 1 to book for next AY—timely planning)
- Lack of diversity among involved students
- Outreach to under engaged students

**Ongoing/future assessments:** In this section please describe **your group's plan** moving forward. Did you come up with any new initiatives specific to your working group?

- Co-Curricular Transcript
- Use of Noel Levitz Data
- Use of Alcohol Edu Data
- Opening of the Wellness Center
- Expand program offering for commuter students

### **Marketing of Programs/Services Working Group**

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **campus climate and/or cross-divisional work**?

- Met with the Marketing department to discuss the university vision for a consistent branding.
- Student Affairs participated in Admissions Open Houses and will be participating in Congratulations day.

- Offices worked to properly brand materials used for recruitment and retention purposes.

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Ensure all marketing materials should properly support the university's campus climate.
- There should be a consistent look to all materials, table appearance, staff and faculty dress to achieve a cohesive look and feel to the university during open house type events.

**Ongoing/future assessments:** In this section please describe **your group's plan** moving forward. Did you come up with any new initiatives specific to your working group?

- We plan to interview the student affairs departments to learn what each department is currently doing for marketing. We can use this information to learn effective strategies from each other and determine what each is doing and materials they are using for their marketing efforts.

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **student engagement**?

- Expansion of new Medias for marketing initiatives.
- Cohesive branding identity.

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Funding for new marketing initiatives (technology, etc.)
- Consistent enforcement of branding guidelines to direct departments when purchasing marketing materials (shirts, table covers, giveaways, etc.).

**Ongoing/future assessments:** In this section please describe **your groups plan** moving forward. Did you come up with any new initiatives specific to your working group?

- Gather information on how departments interact/reach out to the student population.
- Determine a best practices guide for all student affairs departments.

### **Retention Working Group**

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **campus climate and cross-divisional work**?

- Student Intervention Team (SIT) has evolved into a cross-divisional team following nationally established best practices for identifying and intervening with students presenting with mental health issues/behavior challenges. Over



the past few months work has been focusing on marketing, training, and website development

- Title IX cross-divisional training delegates, faculty and staff. Working on marketing campaign. Collaboration with Diversity, Inclusion and Equal Opportunity
- Faculty Staff Guide published by Disability Services Office and distributed to all faculty (full-time, part-time, adjuncts) and all staff. Available in “hard copy” or online
- Career Services providing outreach to all faculty during SP16 semester. Multi-prong approach, including but not limited to: presenting in classes, mock interviews, dining etiquette, several career fairs.
- Counseling Center Webinar: Offering webinar three times for faculty addressing classroom behaviors and mental health concerns.

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Given student development theory model, student needs far outweigh current resources (time, money and staff).
- Unconditional acceptance in each division’s role and acknowledgement of various areas of expertise within the University structure.
  - Proposed Strategies:
  - Student Affairs Dean and Academic Deans meet monthly.
  - Student Affairs Professional Staff attend Chairs Meetings once/semester.

**Ongoing/future assessments:** In this section please describe **your group’s plan** moving forward. Did you come up with any new initiatives specific to your working group?

- Counseling Center conducts a faculty survey annually with a follow-up letter and brochure to all faculty, including adjuncts.
- More educational/training opportunities on the following topics:
  - Title IX
  - Faculty Mental Health Training
  - Faculty Staff Guide from DSO
  - Faculty Outreach from Health & Wellness
  - Efforts to increase racial diversity within staff

**Highlights:** Provide **3- 5 significant highlights** from your review from the past few months (in bulleted form). What does the group believe some of the strongest initiatives are that relate to **student engagement**?

- Career Services Programming (many events)

- Counseling and DSO Offices: Individualized case management approach when assessing students' mental health and other disability related issues as well as academic needs. This will serve to better facilitate the students connections with both on campus and off campus support systems.
- DSO and Athletics Joint Orientation for exempt first year students
- DSO, Academic Success and Athletics Workshop at Accepted Students Day
- Emergency Funds through Student Affairs

**Challenges:** What challenges did you observe in the divisional plan? How would you address these challenges, or how would you plan to address these in the future?

- Engagement of commuter students
- International students compliance with Dept. of Public Health regulations; this populations would benefit from a case management approach.
- Engagement of non-traditional students; currently meet with students on a case-by-case basis.

**Ongoing/future assessments:** In this section please describe **your group's plan** moving forward. Did you come up with any new initiatives specific to your working group?

- Career Services uses an evaluation form at every event and utilizes responses to improve services.
- All Student Affairs departments conduct annual evaluations of programming and direct services.
- All Student Affairs departments keep up to date with current trends and best practices in their respective fields.

## **Academic Excellence**

In collaboration with the Center for Teaching and Learning (CTL), The Binienda Center for Civic Engagement (BCCE), in efforts to forward the strategic plan goal of Engaged Citizenship, will provide \$1000 to faculty -- 1 from Humanities and Social Sciences and 1 from the School of Education, Health, and Natural Sciences -- to develop modules within established classes that involve community based / service projects.

The Binienda Center has awarded Dr. Kevin Anzzollin (World Languages) a \$1000 stipend to develop Spanish Conversation 1: La Diaspora Caribena as a civic engagement course.

## **Cross Divisional Collaborations-two examples**

### **Binienda Center for Civic Engagement and Education Department**

This year, The Education Department and the Binienda Center for Civic Engagement are welcoming Jumpstart to campus. Jumpstart, which is a program of the National Corporation for Community Service, has as its mission is to work towards the day that every child enters kindergarten prepared to succeed. WSU students participating (as we call them, Corps members) receive training in the fall and then spend time in low income Worcester preschools regularly throughout the academic year. Each Corps member is put on a team of peers to go into the same preschool classroom each week and are assigned 2-3 children to focus on for the year. Jumpstart asks for a commitment of around 12 hours per week which adds up to over 300 hours over the course of the year. At the end of the year students will qualify for an AmeriCorps education award (\$1200) as well as certification by the Massachusetts Department of Early Education and Care. This year, WSU recruited 30 students to the program.

### **Campus Approach to Wellness**

In an ongoing effort to increase communication between divisions and support for students in crisis, the Counseling Center has developed a new wellness campaign entitled TeamUp for Healthy Minds. The fall semester started with trainings on new approaches to behavioral intervention teams and campus-wide suicide prevention programs. The spring so far has a series of programs for faculty on the topic of managing student mental health issues in the classroom.

Athletics and the Health and Wellness Office will use the new Wellness Center to re-launch recreation and personal programming. Members of the community are actively defining a new holistic approach addressing all of the dimensions of wellness. This model identifies traditional activities (intramurals, fitness center, etc.) as part of programming, but strategically, the mission is more comprehensive and campus-wide.

### **Strategic Planning Incentive Fund Grants (SPIF)**

#### **Career Services**

##### ***Filling The Gap In Undergraduate Career And Life –Planning Services and Support***

programming has provided the platform for dialogues between regional employers and faculty to: discuss employer expectations for new employees; allow faculty to highlight advantages to employers of the range of critical thinking, quantitative literacy, and rounded education informed from a liberal arts and sciences curriculum; and provide more coherent direct pathways to emerge for WSU students to particular high value employment as appropriate.

These dialogues involving regional employers have better informed faculty, students, and alumni regarding employer expectations of new interns and employees. Although attendance at the Employer Faculty Dialogs has been less than desired, clear collaborations have been formed amongst participants.

It was concluded there is a need to invite more faculty to the table to discuss how a partnership with Career Services may directly support their work, and their respective students. Therefore

to address this we submitted an addendum to our original proposal identifying the need for additional personnel to create sector specific collaborations between Career Services and faculty. Our request funded a position for a Liaison who is now responsible for strengthening existing relations as well as creating new relations with both internal and external community players.

The Liaison is making strides creating informative events, advising Deans, Department Chairs, and faculty about manners by which we can support their individual classrooms with credit bearing syllabi activities. Ultimately the series of events will increase the career development of WSU undergraduate and graduate students, and alumni. As seen below, efforts from this grant have already produced bridges into several academic departments, directly resulting in increased students receiving career development guidance and support services. Below is a listing of events sponsored by the SPIF grant:

- Healthcare Employer/Student Panel
- Non-Profit Employers/WSU Faculty Breakfast
- Non-Profit Employer Student Panel
- Business Employers/WSU Faculty Breakfast
- Business Employer/Student Panel
- Bio-Biotech Employer/Faculty Breakfast
- Bio-Bio Tech Employer/Student Panel
- Non-traditional Education Employer/ Faculty Luncheon
- Non-traditional Education Employer/Student Panel
- Embarking On A Shared Vision Of Student Success Guide
- Sail Through Your Next Interview-Mock Interview Day

### **The Binienda Center for Civic Engagement**

This year (15-16), with SPIF funds, The Binienda Center, the Sociology Department, and International Programs, with some help from Multicultural Affairs Office, recruited 12 sophomore-level students from underrepresented groups with demonstrated financial need into a “Civic Corps.” Each student was paid (or will be paid) \$1000 in an effort to increase student access to service learning, faculty-led travel, and also to develop the skills and knowledge of students, and improve the level and quality of civic engagement on campus overall. This program has been a success. We have students working in Recreation Worcester, four travelling to the Dominican Republic with Professor Velez, and four travelling to NICA with Professor Guevara. This proposal seeks to renew funding for this project in fiscal year 2017 giving additional sophomore ALANA students the opportunity to work with faculty and staff in a variety of para-professional, community engagement projects such as: playing an organizational role in Recreation Worcester, The WSU Jimmy Fund Council, Jumpstart, and Working for Worcester, or faculty-led travel.

### **Athletics and Communications Department**

The Communication and Sports Broadcasting Internship program has made great strides over the past few months. After a delayed start due to the slow arrival of broadcasting equipment, combined with the logistics of the interns learning how to operate the equipment, the students have done a very good job in providing broadcasts of select Worcester State home games ("Lancer Selects"). These broadcasts have allowed for parents, alumni, and other WSU supporters to receive a higher quality live video feed of the game(s) on their computers, and also to receive play-by-play and color analysis of these select games.

These students have proactively created "Lancer Nation Station" - a YouTube channel showing highlights and providing pre and post-game coverage of our 19 division III Worcester State varsity athletic teams. As sports information interns, they produce and coordinate interviews of Worcester State athletes and coaches to use for Lancer Nation Station.

### **Campus Climate**

Moving forward, the Division of Student Affairs has made a commitment to training on topics of diversity as it relates to social justice, inclusive workplace, and engagement of our student body. The following trainings have been scheduled for the remainder of 2016:

- Student Affairs division-wide retreat with Robb Jones from Holy Cross 5/24-5/25
- Director and Associate Director of Athletics to attend NCAA Inclusion Forum
- Front Line staff training-August
- Additional Division Trainings throughout the semester

# University Advancement

## Goal 1: ACADEMIC EXCELLENCE

The overarching goal of all activities of the Office of University Advancement is to promote the academic excellence of Worcester State University. Like a number of support divisions, our activities frequently happen behind the scenes, outside the classroom, and with different constituencies other than students or faculty. Our primary focus of supporting this strategic goal is financial, with direct support for students, programs, and the campus physical plant. Secondly, a number of our activities either directly or indirectly promote the academic excellence of Worcester State through our communication and marketing efforts of Advancement activities and our events themselves.

The greatest highlight of the Advancement Office's impact on academic excellence is the evidence of the impact of donor-funded scholarships on student retention and graduation completion rates. The attached charts demonstrate the significant impact on yield and retention of students who receive donor-funded scholarships over those who do not participate in the program. As a reminder to the committee, the scholarship program is open, available, and advertised in multiple formats to all students in collaboration with Academic Affairs, Student Affairs, Marketing and Enrollment Management from January to April each year.

Significantly, six-year graduation rates of students who receive scholarships are nearly 25% higher for the fall 2007 cohort and 15.5% higher for the 2008 cohort than those students who do not receive scholarships. We are confident in saying that continuing our scholarship program and fundraising for scholarships will remain a top priority for the Advancement division in our support of Academic Excellence.

You will see in our Goal 1 report a number of other ways we are working to support Academic Excellence this year with donor funding for the Center for Teaching and Learning, the Honors Program, and grants for student research, scholarship and creative activity. The CTL and grant areas have not yet been assessed for the year. For impact on students, we've determined the best measurement to use to be impact on retention, and we won't have updated numbers till close of semester.

The detail of the impact of donor funds on the Honors Program is attached in an impressive report from the Director. With funds used for study abroad scholarships, research and travel grants, course development and programming, and achievement awards, the Director notes that funding provided a "substantial positive impact on the learning opportunities of a significant number of Honors students."

In FY16, we had also intended on working more with faculty for informal talks and presentations to donors and alumni. We have regularly collaborated with the chorale director and the gallery director for a number of years, and intended on growing those programs a bit. However a near-five-month-long vacancy in staffing in the alumni office due to a resignation negated those plans. Additionally, it offered us a chance to revision the position, which has been recreated with a stronger focus on student programming. Goals for FY17 will likely be different.

#### **Goal 4: CAMPUS COMMUNITY (CAMPUS CLIMATE)**

Perhaps second to Academic Excellence is the Advancement Office's pursuit of supporting a "vibrant campus life and a collaborative work and learning environment in which all members of the WSU community feel welcomed, included, respected, empowered and valued."

You will note from our grid for Goal 4 that we have added significant activities and action steps to our plan for this fiscal year, many in close collaboration with other divisions. We aim to engage all our constituents (students, faculty, staff, alumni, donors, and community members) with a common goal of civility and respect. Creating a culture of philanthropy starts long before someone makes their first gift. It starts with creating a feeling of being connected, understanding the significant impact paying forward the good, the help, and the support that you have received to others. It sometimes means breaking down barriers to long-standing processes that are no longer relevant, and sometimes breaking down barriers between groups. It starts with creating an awareness among the students that there are people in the world who care about WSU and them even if they don't know them personally. It starts with listening to people's questions and desires, and adapting programs or publications to fill those needs. It starts with creating a value for the activities and programs of WSU starting when a student first enters the campus and transcending beyond graduation year.

Significantly, one of the first major changes completed this year was a complete re-design of the alumni magazine, including a name change to Worcester State Magazine. Focus groups of students, young alumni, board members and members of the WSU faculty community were consulted throughout the planning process. A new designer with fresh ideas and an eye toward engaging visual layouts was brought on and the magazine was launched in the fall.

We launched the Thank A Donor day utilizing students on campus to sign notes of gratitude to donors on the same day we hold our Distinguished Donor reception at Mechanics Hall. This event annually features a student speaker as well as the President. Adding the Thank A Donor activities to the campus life of the day links students to the notion of philanthropic support and helps them realize that there are alumni and friends out in the world who believe so much in the mission of WSU and them that they give back generously.

Listening to the feedback of students and alumni, we've retooled our Business After Hours and our Department Reunions to become "Alumni Connections" events, bringing together alumni, faculty, and students to not just socialize, but to network and establish career connections. We have also, through our Change Lives campaign, launched our online alumni career mentoring network, utilizing a model that UMass has piloted to great success. This was supposed to launch in January, but Procurement constraints delayed it until just this month, April, 2016.

A specific response to creating a wholesome, safe and nurturing environment for students is our sponsorship of a talk by Dr. Kristen Lee Costa '96, who is a noted expert on stress management. This talk is specifically designed for students needing to manage academic stress.

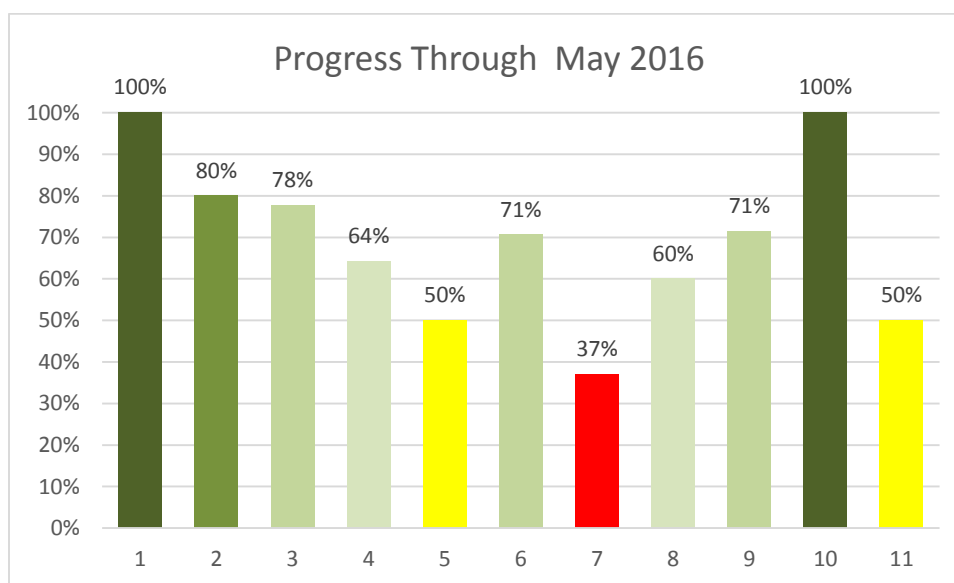
Our annual Day of Giving has become a great example of nurturing a vibrant campus life. All student organizations, athletic teams, SGA, and CLEWS are invited to participate in the day by helping with activities on campus that show gratitude to the donors of the day. More than 90 students participated. Additionally, alumni are utilized as social media ambassadors out in the world to promote the Day of Giving among WSU friends and others and preliminary numbers for the Day of Giving are more than 500 gifts and more than \$63,000 raised.



## NEASC Projections

121 projections were identified in the 2012 NEASC Self Study document, prepared for the ten-year accreditation update. Progress has been made over the past four years, with 63% of the projections completed (76 of 121). Those identified for Standards 1 and 10 have been completed. There has not been much progress on the projections for Standard 7, Library and Other Information Sources, with only 37% complete. This is primarily due to the turnover in library positions.

Standard	# Projections	Completed	%	
1	2	2	100%	
2	10	8	80%	
3	9	7	78%	
4	28	18	64%	
5	6	3	50%	
6	17	12	71%	
7	27	10	37%	
8	5	3	60%	
9	7	5	71%	
10	6	6	100%	
11	4	2	50%	
	121	76	63%	



The complete table of responses is stored on the Google Site,  
<https://sites.google.com/a/worcester.edu/sprc---strategic-plan-review-committee/> .

## Appendix A - SPIF Updates

\$423,455 was set aside for strategic plan implementation grants to support work directly related to the strategic plan. Grant proposals were submitted to the Strategic Plan Implementation Fund (SPIF) review committee in the fall 2014 semester. Recommendations were submitted to the president's direct report group for final approval. 13 proposals were funded for a total of \$371,568.50. Monies were made available to the proposers during the spring 2015 semester. Updates have been submitted in October, 2015 and April 2016. The final reports are due September 30, 2016.

Project	Award	Divisions	Authors	Strategic Plan Goals	April 2015	Oct 2105	April 2016	Final Report
The ALANA Initiative: Expanding and enriching curricula and community for ALANA and all students at WSU	\$ 30,262.00	Academic Affairs, University Advancement, Student Affairs, Enrollment Management	Michelle Corbin, Aldo García Guevara, Tanya Mears, Marcela Uribe-Jennings, Kristin Waters	1, 2, 3, 4, 5	N/A	√	√	
CitySpeak: A New, Interdisciplinary Model to Address Urban Issues Through the Arts	\$ 9,970.00	Academic Affairs	Tom Conroy and Sam O'Connell	1	N/A	□		
Communications and Sports Broadcasting Internship	\$ 6,220.00	Academic Affairs, Student Affairs	Michael Mudd, Nikki Narducci and Don Bullens	1, 2	N/A	√	√	√
Creating Assessment-driven, Evidence-based Training for First Year Seminar Faculty	\$ 38,625.00	Academic Affairs	Charlotte Haller	1, 2, 3	N/A	√	□	
Development of a Watershed Science and Education Co-Laboratory to Advance Student Learning, Foster Undergraduate Research, and Engage the Community	\$ 75,957.00	Academic Affairs	Timothy Cook, William Hansen, Elena Braynova, and Karl Wurst	1, 2, 3	N/A	√	√	√
Faculty Ambassador Program for International Students	\$ 4,000.00	Academic Affairs	Katey Palumbo, Sam O'Connell, Jackie Brennan	1, 3, 4	N/A			

Filling the gap in Undergraduate Career and Life Planning Services and Support	\$ 26,852.50	Academic Affairs, Student Affairs	Matthew Johnsen, Jillian Anderson, Kristie Haskell (Pivot Point Strategy and Solutions), Karen Pelletier (Worcester Regional Chamber of Commerce)	1, 2	N/A	√	√	
Increasing student access to Global and Local Service and community engagement overall, through a Civic Corps, in order to promote student retention and success	\$ 18,360.00	Academic Affairs, Student Affairs	Mark Wagner, Aldo Guevara, Marcela Uribe-Jennings, Katey Palumbo	1, 3	N/A	√	√	
Study Away Scholarship Program	\$ 30,000.00	Academic Affairs	Katey Palumbo, Sam O'Connell, Jackie Brennan, Aldo Guevara	1, 3	N/A			√
Study the cultural impact of Worcester State University and create a long-range plan for culture and the arts at WSU and in the community and region.	\$ 35,500.00	Academic Affairs, University Advancement, Student Affairs, Enrollment Management	Adam Zahler & Kristin Waters	1, 2, 3, 4, 5	N/A	√	√	√
Upgrade Colleague Reporting and Operating Analytics/SAP Business Objects Software to version 4.0	\$ 10,240.00	Academic Affairs	Colleen (Kelly) Laviolette	1	N/A	√	√	√
Urban Networks	\$ 25,000.00	Academic Affairs, Enrollment Management	Thomas Conroy and Mary Jo Marion	1, 2, 3	N/A	√	√	
WSU Archives Project: More Effectively Using and Promoting the Special Collections	\$ 60,600.00	Academic Affairs	Aldo Guevara, William Shakalis, Erika Briesacher, Tom Conroy, Josna Rege, Mark Wagner, Roberta Kyle, and Linda Hixon	1,2,4	N/A	√	√	

Grant information is located on the Google site, <https://sites.google.com/a/worcester.edu/sprc---strategic-plan-review-committee/>.

## Appendix B –coffee & Conversation

The Strategic Plan Review Committee recommends that the president's office implement a monthly Campus Coffee Break. The Worcester State Coffee Break is an opportunity for the staff and faculty to come together in a social setting for a short period of time each month. We recommend the event be held on the first Wednesday of every month from 2:00PM to 3:00PM, hosted on a rotational basis by the five university divisions and the office of the president. Each division will be responsible for paying for the catering and hosting the university community either within their division space or a meeting room scheduled through Conference Services. The committee recommends that the coffee break be an hour long. This will give people a chance to stop by for a few minutes between meetings and rotate office coverage. It is important that all faculty and staff be encouraged to attend.

### Benefits

We feel a university coffee break will help foster community, aiding in the cross-divisional operation of the university. It will help improve the campus climate by giving the university staff and faculty a chance to get together socially. The committee has found that each division has excellent opportunities for cross-division collaboration. Communication of these initiatives could be improved. We propose that the coffee break host division assemble a 6 month calendar that lists projects and events (both confirmed and tentative) that each division has upcoming. It would be the responsibility of each division to email their events to the coffee break host 1 week prior to the upcoming coffee break for compilation. The finished cross-division calendar would then be projected at the coffee break so everyone can see what is coming up. We believe this will increase communication and cross-divisional collaboration.

### Costs

*Time* This event would cost the university staff time. To foster a community of inclusion, it is imperative that all employees be encouraged to attend. This means that division heads and managers should work with their employees to manage office coverage. It is for this reason that we recommend the event be 1-hour long. The purpose being that staff can attend the coffee break in shifts. We feel it is important that the all-inclusive push for this come from the president's office. We, as a university, need to foster a culture of inclusion that puts value on interpersonal relationships and scheduled social times such as the Worcester State Coffee Break.

*Money* The Strategic Plan Review Committee recommends that the financial burden of this event be spread evenly between the divisions and president's office with each area taking a turn hosting, planning and paying for the catering. We have a campus community of 550 people. Assuming 250 people attend the coffee breaks, we recommend a budget of \$875 per month. The rotation of hosting duties will mean that each division will be responsible for hosting twice per year.

### Sample Schedule:

September 7, 2016	President's Office
October 5, 2016	Academic Affairs
November 2, 2016	Administration and Finance
December 7, 2016	Enrollment Management
January 4, 2017	Student Affairs
February 1, 2017	University Advancement
March 1, 2017	President's Office

April 5, 2017	Academic Affairs
May 3, 2017	Administration and Finance
June 7, 2017	Enrollment Management
July 5, 2017	Student Affairs
August 2, 2017	University Advancement

**Sample Calendar:** This is a sample of a cross-divisional calendar that could be displayed at the coffee break. The events in the calendar are imaginary.

Date	September	October	November
1	Pre-College Conference	EM Understanding Financial Aid	Pre-College Conference
2	UA Event	SA Trip to WAM	UA Event
3			
4	SA Welcome Back Students Table meeting		SA Welcome Back Students Table meeting
5	Labor Day: NO CLASSES	SA Student Assistance Meeting	Labor Day: NO CLASSES
6	Classes begin	AF Procurement Training	Classes begin
7	UA - Biology Alumni Reception		UA - Biology Alumni Reception
8	AA STEM Success		AA STEM Success
9	AA Music Success/ EM Understanding Financial Aid	AA Honor's Department Reception	AA Music Success/ EM Understanding Financial Aid
10	AA Event English Lit. Success	AA Choral Auditions/ EM Open House	AA Event English Lit. Success
11		AA Lecture on Irish Immigration in America	
12	Last day to add day courses	AF Photoshop Training	Last day to add day courses
13	EM Understanding Financial Aid		EM Understanding Financial Aid
14	SA Icecream Social	SA Football Game	SA Icecream Social
15		UA Homecoming	
16	Last day to add day courses	UA Reunion	
17	EM Understanding Financial Aid	AF P Card Training (TENTATIVE)	EM Understanding Financial Aid
18	SA Icecream Social		SA Icecream Social
19	Last day to add day courses	EM Understanding Financial Aid	
20		SA Taco Tuesday	
21			
22	President's Office - Convocation	SA Duck Hunt	President's Office -Coffee (TENTATIVE)
23		AF Excel Training	
24			
25	President's Office - Open office hours	UA - Music Alumni Reception (TENTATIVE)	
26			
27			
28	EM Celebrate Diversity in Enrollment		EM Celebrate Diversity in Enrollment
29	AF Procurement Training		AF Procurement Training
30			
31		UA - Pictures with Chandler E. Lancer	

## Appendix C - The Disney Way

The Disney Model of Management focuses on putting the customer first. Disney promotes four keys for excellent customer service: Safety, Courtesy, Show and Efficiency. Safety is always the top priority followed closely by courtesy. Disney employees are trained to be “assertively friendly” to all customers. All employees, front-line or back-end, are dedicated to the customer experience and will help a customer even if it is not their primary job function. In the book The Disney Way: Harnessing the Management Secrets of Disney in Your Company<sup>[i]</sup> authors Bill Capodagli and Lynn Jackson examine the Disney four core concepts of Dream, Believe, Dare and Do. The four concepts are further broken down into the Disney Company’s 10 management principles:

1. Give every member of your organization a chance to dream, and tap into the creativity those dreams embody.
2. Stand firm on your beliefs and principles.
3. Treat your customers like guests.
4. Support, enable, and reward employees.
5. Build long-term relationships with key suppliers and partners.
6. Dare to take calculated risks in order to bring innovative ideas to fruition.
7. Train extensively and constantly reinforce your organization’s culture.
8. Align long-term vision with short-term execution.
9. Use the storyboarding technique to solve problems, plan projects, and improve communication.
10. Pay close attention to detail.

In University Advancement this means we have fostered a culture of placing our constituents’ (alumni, donors, and WSU and neighborhood community members) needs first. We smile at our guests, offer them coffee or refreshment and answer their questions promptly. Our mantra is “we build and maintain relationships” and place close attention to the “details”. No phone goes to voicemail while the office is open. Anyone in the office is encouraged to pick up a ringing phone and help the caller.

UA has bi-weekly full staff meetings where we review what each area is working on and upcoming/tentative events and initiatives. This level of communication gives everyone in the office an overview of the division and allows us to answer customer questions. UA employees are encouraged to read The Disney Way: Harnessing the Management Secrets of Disney in Your Company by Bill Capodagli and Lynn Jackson. Copies of the book and other Disney management books can be found in the department.