

## **Compass 2021: Mount Union's Strategy to Lead, Collaborate, and Innovate**

### **A Foundation for Success**

In December 2015, the University of Mount Union concluded *Advancing Excellence*, an ambitious five-year strategic plan that focused on the curriculum, the student experience, enrollment, diversity, financial stability, and visibility. In implementing the plan, the University's campus was transformed by new and renovated buildings, outdoor gathering spaces, and apartment-style housing options. The curriculum was revised through the introduction of the Integrative Core and a four-credit-hour-based system, and new undergraduate and graduate programs were added, with a special focus on health care programs. The introduction of graduate programs ultimately led to university status for Mount Union. Stable enrollment was achieved in a volatile environment, and the diversity of the student body and the faculty increased. The University's first brand plan was adopted and implemented, and the University's history of financial stability was continued.

As the close of *Advancing Excellence* neared, the University began work to create a new strategic plan, one that would build upon the successes of the previous plan and help propel the University into the future. After months of work, and with input and assistance from many members of the University community, the Steering Committee has prepared a proposed strategic plan that is realistic and aspirational, that leverages the University's existing strengths and recent accomplishments, that builds on the successes of *Advancing Excellence*, and that focuses on the student experience.

The proposed vision and plan are not meant to address all the important tasks the University will undertake in the next five years. They focus, instead, on areas that provide the most opportunity for innovation, growth, and continued excellence.

### **Mission**

The mission of the University of Mount Union is to prepare students for fulfilling lives, meaningful work and responsible citizenship.

## **Vision for 2021**

In 2021 the University of Mount Union will be a vibrant, comprehensive Midwestern university of 2,700 students, including 2,200 undergraduates and 500 graduate students who will study on the Alliance campus, online, and potentially, at satellite sites. Technology will be imaginatively and flexibly deployed to enable effective teaching and learning, to bring the world into Mount Union classrooms, and to overcome obstacles of distance, time, and expense that often prevent students from achieving their educational goals.

To students and families seeking a personalized education combining breadth of knowledge and perspective with career-specific study and experiential learning, the University of Mount Union will offer an optimal combination of exceptional quality, reasonable cost, and preparation for career success. The University's scholarship and financial aid programs will allow the University's notably diverse student body to access an academic experience that inspires them for global engagement in the 21<sup>st</sup> century and prepares them to be valuable leaders for the world.

We will be known for offering an undergraduate curriculum that is integrative, encouraging students to gain the breadth of knowledge and perspective fostered by a liberal arts education, to understand the multiple means by which academic disciplines create knowledge and find meaning, and to prepare for career success and leadership in service to others. New academic offerings and active revision and updating of extant programs will help ensure that our students receive an education that is valuable and relevant. Experiential learning that leads to career success will continue to be strongly emphasized across the curriculum.

Graduate program offerings will build on the University's strengths in health and medical sciences, explore new opportunities in data and computer sciences, and continue the University's outreach – begun with its MAEL program - to part-time graduate students with programs in the social sciences and business and management. All Mount Union students will study in an environment that features personal attention, small class sizes, active and experiential learning, and an emphasis on leadership development.

The University's diverse student body will live and learn in an inclusive environment that values, supports, and celebrates students of varied ages and cultural backgrounds. These students will participate in curricular and co-curricular programs that foster a global mindset and develop intercultural competence that will permit them to excel after graduation. Our efforts to attract and serve American students from a wider geographic area, more transfer and commuter students, more international students, and more part-time and full-time graduate students, will help diversify the University's sources of tuition revenue, strengthening the University's finances.

The University's historical commitment to accessibility will be undergirded by a capital campaign focused on significantly increasing the University's endowment for scholarship support and financial aid.

Mount Union's employees will have appealing opportunities for personal development, continuing education, and career advancement. They will jointly create a work culture that features effective communication, fosters cooperation and innovation, and that is nimble and inventive in responding to opportunities and challenges.

The main purpose of the University's strategic plan is continue Mount Union's planned transition into a comprehensive university that offers our students an integrative liberal arts education while also providing pre-professional and professional education at the undergraduate and graduate levels. The plan honors the University's traditional strengths and commitments while positioning Mount Union to thrive in an environment that requires leadership, collaboration, and innovation.

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### **Strategic Initiatives**

The University's Strategic Plan focuses on six strategic initiatives. The initiatives overlap and interlock, and are designed to be mutually reinforcing. Each key initiative is elaborated through a series of goals. Those charged with executing the plan will work with metrics that allow measurement of results, timelines that detail progress toward goals, and regularly updated estimates of resources that will be needed to attain each goal.

The strategic initiatives mark out directions and set priorities, but in the changeable higher education environment it is not possible to know, or sensible to commit to, the full particulars of how the initiatives will be implemented. Moreover, in an organization that highly values consultation and cooperation, rigid, top-down directives are not feasible or desirable. The University's strategic plan is, therefore, iterative and subject to adjustment.

Although final responsibility for carrying out the plan lies with the president and senior administrators – with guidance and supervision by the Board of Trustees - effective implementation of the plan will require the assent, cooperation, and effort of all the University's people and key groups. Faculty will play leading roles in development of new academic programs and in fostering innovation in teaching and learning in current programs. Administrators and staff will use Mount Union's annual goal setting and performance planning process to move key projects forward. The University's Board of Trustees will exercise its oversight to ensure that priority goals – those proposed in this plan and those to which the University is already committed - remain salient and that adequate resources are allocated for their achievement. In short, decisions made by the faculty, administration, and Board of Trustees will propel the plan.

## Strategic Initiatives

### A. Enrich the experience of an increasingly diverse student body

#### **Objective A.1: Foster an inclusive culture that is focused on and values diversity.**

- Goal A.1.1: Implement programs that foster interfaith understanding.
- Goal A.1.2: Provide appropriate spaces for religious and spiritual observance of diverse faith traditions.
- Goal A.1.3: Develop gender-inclusive campus initiatives.
- Goal A.1.4: Increase offerings and campus engagement in diversity programming.

#### **Objective A.2: Provide programs and support services for our evolving student body.**

- Goal A.2.1: Improve services and support systems for transfer students.
- Goal A.2.2: Improve services and support systems for commuter students.
- Goal A.2.3: Develop services, support systems, and processes to meet the needs of graduate students.
- Goal A.2.4: Foster an inclusive and supportive environment for international students.
- Goal A.2.5: Enhance internship and career opportunities for students by fostering cooperation between academic departments and career services, and by improving services to and support for employers who can provide experiential learning opportunities.
- Goal A.2.6: Enhance facilities for intercollegiate athletics to ensure safe and high-quality spaces for practice and competition.
- Goal A.2.7: Study and change space usage in KHIC to maximize support and learning spaces for students, faculty, and administrators.

#### **Objective A.3: Strengthen student success and engagement initiatives.**

- Goal A.3.1: Research, develop and implement an updated academic advising model.
- Goal A.3.2: Create an updated plan for retention.
- Goal A.3.3: Explore innovative student support and success initiatives.
- Goal A.3.4: Create intentional ways to help students understand connections and strengthen alignment between their curricular and co-curricular education.
- Goal A.3.5: Improve campus programming for increased student engagement.

## **B. Cultivate an innovative and expanding academic environment**

### **Objective B.1: Develop new academic programs and offerings while enhancing current academic programs.**

- Goal B.1.1: Research, update, and invest in existing undergraduate programs to maintain their attractiveness to prospective students, enhance student academic experiences, and ensure strong post-graduate outcomes.
- Goal B.1.2: Add new residential and online graduate programs, focusing on health and medical sciences, data and computer sciences, education, social sciences, and business and management.
- Goal B.1.3: Add new undergraduate programs to maintain a vibrant curriculum and sustain undergraduate enrollment.
- Goal B.1.4: Develop new non-degree opportunities in continuing education, professional, and corporate training.
- Goal B.1.5: Explore offering graduate instruction to working adults through satellite sites.
- Goal B.1.6: Incorporate program effectiveness measures and methods into the existing academic program review process.

### **Objective B.2: Develop programs and pathways to meet the needs of new types of students.**

- Goal B.2.1: Adopt new programs that utilize modes of program delivery that appeal and provide success to students with limited access and resources.
- Goal B.2.2: Pursue articulation agreements and adjust transfer policies to facilitate transfer student enrollment.
- Goal B.2.3: Improve articulation between UMU undergraduate and graduate programs.
- Goal B.2.4: Build pathways to shorten time to degree attainment.

### **Objective B.3: Develop a teaching and learning community that fosters innovation.**

- Goal B.3.1: Emphasize preparation for career success by increasing student participation in meaningful and intentional experiential learning opportunities.
- Goal B.3.2: Provide faculty with opportunities to advance innovation and engage new and changing student populations.
- Goal B.3.3: Enhance intellectual curiosity and academic rigor.
- Goal B.3.4: Recognize and reward innovative and student-centered faculty.

- Goal B.3.5: Build and maintain strong Alliance community and regional partnerships to enhance student educational experiences.
- Goal B.3.6: Build endowment and charitable gift support for academic programs.

**Objective B.4: Foster a global mindset and development of intercultural competencies among members of the campus community.**

- Goal B.4.1: Integrate the fostering of a global mindset and the development of intercultural competencies into the curriculum
- Goal B.4.2: Implement learning objectives for each major that foster a global mindset and the development of intercultural competencies.
- Goal B.4.3: Increase student, faculty, and administrator participation in study abroad activities.
- Goal B.4.4: Increase student, faculty, and administrator participation in activities that support the development of intercultural competencies.
- Goal B.4.5: Streamline existing exchange partnerships.
- Goal B.4.6: Maximize internships and student research opportunities within the study abroad program.
- Goal B.4.7: Provide intercultural professional development opportunities and training in global education and intercultural competency for faculty.
- Goal B.4.8: Reward and recognize faculty and departmental efforts to internationalize campus programs and the curriculum.

**Objective B.5: Develop interdisciplinary academic centers.**

- Goal B.5.1: Create new interdisciplinary academic Centers.
- Goal B.5.2: Establish a formal University Scholars program for each Center.

**C. Ensure financial strength, affordability and enrollment success**

**Objective C.1: Diversify the University's sources of tuition revenue.**

- Goal C.1.1: Increase the University's net tuition revenue for graduate and undergraduate students by 30% by growing the overall enrollment to 2,700 students and strategically changing the makeup of the student body.
- Goal C.1.2: Increase the enrollment of undergraduate students, including domestic freshmen, transfer students, and degree-seeking international students, to 2,200 while maintaining targeted discount rates.
- Goal C.1.3: Increase the enrollment of new graduate students to 500 full-time and part-time graduate students.

**Objective C.2: Achieve desired changes in the makeup of the Mount Union student body.**

- Goal C.2.1: Increase the enrollment of domestic diversity undergraduate students to 20% of the undergraduate student body.
- Goal C.2.2: Increase the enrollment of international students to 7% of the undergraduate student body.
- Goal C.2.3: Gradually reduce athletics squad sizes, while providing appropriate athletics funding to support an excellent experience for student-athletes.
- Goal C.2.4: Consider adding emerging sports to help support achievement of enrollment goals.
- Goal C.2.5: Continue to explore and revise scholarships for co-curricular non-athletic activity programs.
- Goal C.2.6: Increase the enrollment of graduate students, both full-time students studying on campus and part-time students studying online or at satellite sites.
- Goal C.2.7: Increase the number of domestic students recruited from western Pennsylvania and from mid- and southern Ohio while identifying additional domestic recruiting markets outside of Ohio.

**Objective C.3: Enhance affordability through charitable gift support for scholarships that reduce the cost of attendance.**

- Goal C.3.1: Organize and execute a capital campaign that will secure current and deferred gift commitments of \$50 million for the endowment (to be confirmed by a campaign feasibility study).
- Goal C.3.2: Annually secure gifts totaling \$100,000 to \$200,000 for the student rescue fund.

**Objective C.4: Keep tuition increases at modest levels by increasing non-tuition sources of revenue.**

- Goal C.4.1: Increase the number of camps, conference participants and resulting revenue, with emphasis on academic department/faculty led camps aligned with supporting recruitment goals.
- Goal C.4.2: Increase the successful pursuit of corporate, foundation, and government funding to support academic programs/sponsored research.

- Goal C.4.3: Create a faculty-administrator think tank group focused on increasing non-tuition revenue.
- Goal C.4.4: Earmark innovation funds in the annual budget to provide start-up funding for new ideas that may enhance revenue.

**Objective C.5: Ensure excellent management of resources to ensure quality, control costs, and limit tuition increases.**

- Goal C.5.1: Create a program effectiveness review process for administrative cost centers.
- Goal C.5.2: Create a key performance indicators dashboard for campus constituents.
- Goal C.5.3: Evaluate employee needs with respect to compensation, benefits, training and development.
- Goal C.5.4: Provide a more comprehensive budget development timeline that permits the effective review of proposed on-going and new costs.
- Goal C.5.5: Seek collaborative relationships with educational institutions and other non-profit organizations to reduce overhead and leverage our strengths.
- Goal C.5.6: Develop a multi-year funding priority plan for equipment replacement and upgrades.

**D. Brand the University as a remarkable Midwestern institution**

**Objective D.1: Use a data-driven approach to refine the institution’s brand plan.**

- Goal D.1.1: Revise the brand plan based on market research results, prioritizing prospective student, parent, and current student input.
- Goal D.1.2: Create a positioning statement including three target messages focusing on academics and outcomes with affordability serving as a complementary message.
- Goal D.1.3: Develop and implement a strategy to share the brand plan with internal audiences.
- Goal D.1.4: Develop and implement a strategy to leverage current students and alumni as brand advocates.
- Goal D.1.5: Map the communication lifecycle of external audiences.
- Goal D.1.6: Build a data-collection infrastructure for benchmarking and measurement.

**Objective D.2: Position the University as a well-recognized institution in the Midwest offering exceptional value and a personalized experience rooted in: 1) an ideal combination of academic excellence and affordability, and 2) a focus on leadership development that helps our graduates achieve outstanding career success.**

- Goal D.2.1: Alter internal and external perceptions that currently regard the University as a Northeastern Ohio-based institution.
- Goal D.2.2: Expand the visibility of the institution into western Pennsylvania and mid- and southern Ohio and other geographic areas identified by the Office of Enrollment Management.
- Goal D.2.3: Differentiate the institution from its current private higher education competitors.
- Goal D.2.4: Identify three priority aspirant institutions and develop and implement a strategy to match or exceed their perceived quality.

## **E. Create an effective and collaborative workplace culture**

**Objective E.1: Establish benchmarks that define a quality-focused campus workplace culture.**

- Goal E.1.1: Continue efforts to study current and evolving issues of workplace satisfaction, including regular and planned deployments of the Quality Culture Explorer (QCE) and other similar instruments.
- Goal E.1.2: Take steps to improve workplace culture.

**Objective E.2: Empower open, productive, accessible, and clear communication.**

- Goal E.2.1: Understand, on a more granular level, issues with communication highlighted in results of the QCE Survey.
- Goal E.2.2: Study and understand problems of internal communication and develop and implement plans to improve it.
- Goal E.2.3: Employ and assess validated training to improve horizontal and vertical internal communication.

**Objective E.3: Build, communicate, and ensure compliance with trustworthy policies.**

- Goal E.3.1: Establish campus-wide procedures for creating, challenging, and changing policy.
- Goal E.3.2: Educate the campus community about policy development and enforcement.

- Goal E.3.3: Evaluate and improve communication and consistency of policy enforcement.

**Objective E.4: Create a workplace culture that embraces and supports adaptation to mandated and strategic change.**

- Goal E.4.1: Assess current change management methods on campus.
- Goal E.4.2: Identify, adopt, and assess a valid approach to change management that ensures adequate research, planning, debate/evaluation, rollout and assessment processes.
- Goal E.4.3: Ensure that adequate training is available and accessible to facilitate planned changes.

**Objective E.5: Improve employee morale by improving innovation, collaboration and employee empowerment.**

- Goal E.5.1: Create a safe and supportive environment for innovation and collaboration.
- Goal E.5.2: Ensure committee, working group, and taskforce membership and leadership reflect the breadth of offices and departments and that there is equitable expectation to serve on committees, taskforces and working groups.
- Goal E.5.3: Empower staff and supervisors through opportunities for career development.

**Objective E.6: Improve and support faculty and staff diversity.**

- Goal E.6.1: Establish, implement, and assess efforts to increase administrator and staff diversity.
- Goal E.6.2: Establish, implement, and assess efforts to increase faculty diversity.
- Goal E.6.3: Establish support systems for minority faculty and staff, capitalizing on the existing offices/programs on campus to establish regular programs/ events on annual bases.

**F. Leverage existing and emerging technology**

**Objective 1: Advance teaching and learning through technology.**

- Goal F.1.1: Develop and implement an institutional bring-your-own-device (BYOD) initiative.
- Goal F.1.2: Create new technology-rich, active- and collaborative-learning spaces on campus, considering sites in academic buildings, auxiliary buildings, and student residences.

- Goal F.1.3: Provide additional staffing to improve and support effective faculty use of technology.
- Goal F.1.4: Support faculty development of online courses and curricula.

**Objective 2: Enhance administrative processes and operations through the use of technology.**

- Goal F.2.1: Improve administrative operations and seek reduced operational costs through effective use of technology.
- Goal F.2.2: Increase professional development opportunities related to administrative software for administrators and staff.
- Goal F.2.3: Enable power users to provide leadership in process redesign and training of co-workers.

**Objective 3: Project the University to the campus community and the world through the use of technology.**

- Goal F.3.1: Ensure the flexibility of the Mount Union website to enhance appearance, currency, and interactivity.
- Goal F.3.2: Leverage video as an institutional outreach, development, and teaching tool.
- Goal F.3.3: Review the adequacy of online resources to support the needs of distance learners and complete needed upgrades.

**Objective 4: Optimize and advance technology infrastructure to support the University's initiatives.**

- Goal F.4.1: Balance IT staffing and resources to provide appropriate levels of technology support for faculty, staff and students.
- Goal F.4.2: Improve network data security.
- Goal F.4.3: Prepare network infrastructure for campus technology needs.
- Goal F.4.4: Improve campus safety with the use of technology.

## **The University of Mount Union's Strategy for the Future**

### **About the planning process**

The planning process that culminated in the completion of the strategic plan began in the summer of 2015. Board of Trustees Chair Allen Green and newly-appointed University President Dick Merriman consulted with trustees, administrators, and staff to determine the best means to undertake an inclusive planning process.

As a result of this consultation, the University engaged Dr. Carol Christ, president emerita of Smith College and a consultant with the Association of Governing Boards, to stimulate and lead campus conversations about the planning process. Dr. Christ visited the campus several times in the fall of 2015/early 2016, meeting with the Board of Trustees and with faculty, staff, administrators, and students. In discussions with President Merriman, she shared her findings and recommendations (see Principles of Planning, below).

Dr. Christ's recommendations have informed the planning work undertaken since December 2015. The entire University community participated in a planning discussion in early January 2016. Members of the University's administration and faculty who facilitated those January discussions participated in a similar planning retreat with members of the Board of Trustees later in January. At their January meeting, Mount Union's trustees formally authorized the creation of a Strategic Planning Steering Committee, chaired by president Merriman, whose members included:

Trustees: Allen Green, Scott Gindlesberger, and Laurence Talley

Faculty members: Jamie Capuzza, Danielle Cordaro, Jeff Draves, Osama Jadaan, Michael Kachilla, Lonnie Lowery, and Matt Volansky

Administrators: Jesse Cunion, Pat Draves, Melissa Gardner, Pat Heddleston, and Rich Jackson

Staff: Andrea Williams

Students: Jesse Wynn and Sharita Johnson

The Steering Committee has met regularly since February 2016 and, as it has developed the draft plan, has reached out to the campus community – through topic-focused working groups, focus groups with students, and invitations for suggestions and input – to ask for involvement, information, and perspective.

### **Principles of Planning**

During its planning work, the Steering Committee acted on the recommendations offered by Dr. Christ following her consultation visits to campus. Concerning the planning process, Dr. Christ recommended:

The planning process should result in greater campus understanding of the current situation of Mount Union and of higher education generally.

The process for developing the plan should be inclusive and collaborative, with broad involvement by the University's people.

As the process unfolds, the community should receive updates about its progress and there should be multiple opportunities for University community members to contribute suggestions to and perspectives about the plan.

Concerning the plan itself, Dr. Christ recommended:

- The plan's focus should be institution-wide and student-centric.
- It should clarify Mount Union's value proposition and what differentiates the University in its competitive environment.
- The plan should address the lack of nimbleness and agility at Mount Union, and should focus on improving communication, empowerment, and trust within the University.
- Mount Union's strategic plan should focus on diversifying sources of revenue.
- The plan should be forward-looking, not an opportunity to return to arguments of the past, and it should be fact-driven.
- The strategic plan should contain goals that express measurable outcomes that are realistically aligned with the University's available resources.