



SAINT JOSEPH'S
COLLEGE

STRATEGIC PLAN

Sustaining the Promise:

*Toward Saint Joseph's College's
Second Hundred Years*



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I. Introduction

During 2012, Saint Joseph's College celebrated its centennial. The organizing theme for the year's activities, "Realizing the Promise," encouraged the College community to look back over the past one hundred years and to recognize the complex interactions of people, events, and decision-points that grew from the commitment Sister Mary Xaveria made to the four students who came seeking her assistance with their dream of becoming teachers.

Our centennial year of celebration of the past also became, appropriately, an occasion to turn toward the future. At its December 2012 Board Meeting, the Trustees of Saint Joseph's College asked the College to make preparations for a new strategic planning process to begin in the spring of 2013.

In March of 2013, the Board approved the Strategic Planning process document that has led to the development of this strategic plan, *Sustaining the Promise: Toward Saint Joseph's College's Second Hundred Years*.

Sustaining the Promise reflects an evolution in our understanding of strategic planning at Saint Joseph's College. First and foremost, this is an institutional-level plan whose vision, goals, and initiatives are all purposely focused on the College as a whole. As such, it contains one layer of strategic energy which will need to find expression throughout the institution.

During the 2014–2015 academic year, each of the four major institutional functional areas (Learning/Academic Affairs, Sponsorship and Mission Integration, Finance, and Advancement) will develop strategic plans that align with and support *Sustaining the Promise*. This work will, in turn, establish the context for the development of unit and departmental level plans. These "cascading" strategic plans will allow all sectors of the College community to identify and own their particular contributions to our strategic success. Additionally, because the strategic plans at the different levels are inter-connected ("Objectives" at one level become "initiatives"—See Appendix A for an example), this design enhances our commitment to the plan's Goals.

Additionally, *Sustaining the Promise* introduces an "evergreen" planning model for the College where the five-year detailed planning and the 10 year aspirational planning windows regularly roll forward. This ensures that, rather than something we do occasionally, strategic thinking and strategic activity will become institutionalized at Saint Joseph's College. This, too, is one of the ways we "Sustain the Promise."

II. Board of Trustees' Vision Statement

In May 2013, the Board of Trustees approved the following Vision Statement to serve as a guide for the strategic planning exercise the College was undertaking.

Saint Joseph's College will be recognized for its preparation of life-long learners through innovative course delivery and content that empowers people and communities to meet the challenges of a changing world.

III. Environmental Scan (Internal and External)

The College conducted its most recent NEASC Accreditation Self-Study in preparation for a review by the Commission on Higher Education in the spring of 2012. The College's Self-Study document and the Visiting Team's Report provide a recent and thorough internal assessment of the College's strengths and weaknesses.

Additionally, in the fall of 2012, the College retained the services of GDA Integrated Services to conduct an independent review of the College's undergraduate program and to produce a SWOT analysis. This analysis, done with an awareness of the external environment for higher education, serves as a helpful complement to the College's internal work.

The findings from these studies have been used in the development of *Sustaining the Promise*.

IV. Strategic Narrative

The Strategic Narrative was developed using the input from the 18 "listening/ visioning" sessions conducted during the spring of 2014. It presents a vision of Saint Joseph's College 10 years into the future.

It's 2024. Who are we now?

It's 2024, and at Saint Joseph's College we have experienced a remarkable decade of growth and development. One consequence is that we are no longer one of the area's "best kept secrets." Partly the result of our heightened profile in Portland's and the Lake Region's civic, cultural, business, and education communities, learners of all ages and interests think of Saint Joseph's College not simply as a means to an end, but as a "destination." There are many reasons for this.

We are mission-driven. We are innovative. We are learner-focused. We are growing.

While we continue to pursue the original vision of the Sisters of Mercy by offering an education that nurtures intellectual, spiritual, and social growth, our 21st-century embodiment of the mission looks much different than its 20th-century precursor.

At its beginning, Saint Joseph's focused on educating women just out of high school to be teachers. During the decades that followed, the curriculum grew and additional areas of study were made available. In 1970, the College became co-educational and, in 1976, moved into the emerging world of distance learning. At each step, our understanding of whom we were educating and for what they were preparing expanded. Today, we embrace the reality that the kind of education we are committed to providing goes well beyond undergraduate and graduate courses for credit and degrees. While the core of our educational activity continues to be in these areas, even here we accept the challenge of inviting people to pursue academic, professional, and personal learning goals in formats that work for them. In addition to our traditional single-mode degrees offered in person or online, people

are now earning hybrid degrees and pursuing courses of study outside of degree programs that are tailored to their specific needs and situations.

In every instance a Saint Joseph's education continues to be recognized as special and distinctive because an education at Saint Joseph's College is not ultimately about acquiring skills or memorizing facts; it's about becoming a person of intention. This applies to every member of the College community and, in fact, to the community as a whole. We are an intentional community—one where everyone is committed to the practice and pursuit of the Core Values that are central to our identity as Catholic and Mercy (faith, excellence, integrity, community, respect, compassion, and justice) in everything we do from our educational programs to the ways we work and live together. As an intentional learning community, we are committed to the continuing growth and development of all of our members—students, faculty, staff, residents, and visitors. Our continuing focus on these common concerns has led us to embrace the theme of “wellness and sustainability” as a major organizing principle (“wellness” is the human form of “sustainability”). This gives particular focus to all of our educational programs at all degree levels and also informs such activities as our planning and budgeting, the ongoing development of our campus, and, in fact, everything else that we do.

A visible, active indicator of the importance of these core commitments is the establishment of two “centers” at the College. One focuses on the Study of Human and Natural Environments and the other on 21st-Century Faith and Spirituality. These centers generate credit and other-than-credit educational experiences and opportunities for a wide audience that includes our core constituencies, as well as a growing number of occasional visitors to Saint Joseph's.

In degree-focused programs, the College is able to meet continued high demand in areas such as business, health care, and education, while improving its ability to respond to market changes by providing robust enrollment in the humanities and sciences programs. Synergistic collaboration and the broad liberal arts approach to all academic programs better enable graduates to see their chosen vocation in the context of their own lifelong pursuits and their responsibility to promote the common good of society. Because we are offering a competitive and compelling undergraduate experience, we are able to attract a larger, qualified group of students than at any time in the College's history. There are now 1200 students enrolled in the Sebago Lake program with no plans for additional growth. Forty percent of our students are from Maine, 40 percent from the rest of New England, and 20 percent from outside of these areas.

Students now have more opportunities for learning outside the classroom. More students than ever before are traveling beyond campus, either on service and cultural immersion trips sponsored by the Mercy Center, engaging in community-based learning in the greater Portland and Lake regions, or spending a semester or year studying in a different city or a foreign country. These experiences give our graduates a greater global awareness, which is one of our institutional learning outcomes.

We offer a revamped and richer Honors Program to challenge students who are higher achievers. For students who come to us with less well-developed academic profiles, we have a successful early-start program that helps them make the adjustment to college learning. All students continue to take the First Year Experience course, but that course is now a two-semester sequence and includes a substantial focus on the College's mission. All students also now develop a Personal Learning Plan in consultation with their faculty advisor at the beginning of their first year; the plan maps out a schedule for taking courses, but also begins the process of having the student match her educational plans (curricular and extra-curricular) with her personal interests and career goals. In these ways, we are offering our students much more personal, academic, and professional support than ever before.

Our online programs continue to attract students from across the country and around the world, and we enjoy a reputation for quality that is the envy of other online institutions, in part because of our continuing commitment to the values of personal attention and interaction. Our online learning community is a model for successful, sustainable distance learning with consistently good graduation rates and time-to-completion statistics across our programs. Many students working on degrees online have their first degree from the Sebago Lake program. Indeed, one measure of our success is the number of Saint Joseph's College graduates who have earned more than one degree or completed more than one program either in-person or online at Saint Joseph's. This is increasingly possible because we have expanded our online program offerings. In addition to the strong programs in professional areas that the College has long had, we are now offering multi-disciplinary graduate degrees focusing on emerging challenges and issues in the contemporary world. We have recently graduated our first groups of doctoral-level students.

To support both our on-campus and online students, we have also expanded the resources we offer to all students. While the Academic Center continues to work with students who require learning accommodations, including those whose college preparation reflects a legacy of poverty, it is now seen as a resource for the entire community. The Academic Center has also expanded its tutoring program and Writing Center hours, and the College now offers these services to online students. This inclusive approach is also followed in the Career Services Office, which now actively engages all students throughout their time at the College and continues to support them as alumni. In addition, we offer more extensive counseling to students and parents so that they are better able to make financial plans to support their educational aspirations.

Recognizing that our learning community will be healthier and more sustainable if all of its members are provided with opportunities to continue their growth and development, the College has also made a substantial commitment to professional development for faculty and staff. The Faculty Center now has a full-time director and offers training seminars, workshops, and roundtables, and connects the faculty with the latest research on teaching and learning. Professors make use of these resources in their regular reviews of their individual performance and department curricula. The College also supports great teaching through awards, grants for

curriculum/pedagogical development, and by emphasizing teaching in decisions regarding tenure, promotion, and merit pay raises. Similarly, staff have access to integrated professional development programs that are funded at appropriate levels.

This commitment to the continuing professional and personal growth and development of faculty and staff is an integral part of why the College is now recognized as a “best place to work” in various surveys. The College offers competitive salaries and a creative and responsive menu of benefits.

We have made the Campus at Sebago Lake a more vibrant place to live, work, and learn by scheduling more events such as concerts, lectures, film screenings, art exhibits, workshops, etc. This change has improved campus life for students, not to mention faculty and staff. Although some of the events are entertainment-focused, many of them offer opportunities for intellectual enrichment and formation outside of the formal classroom setting. This means that we have used campus programming to develop a stronger culture of learning. Expanding our programming has also allowed the College to draw more visitors from Standish and Windham, from Portland, and from tourists spending their vacation time in the Lakes Region, which in turn has helped to further improve our reputation with our neighbors and in the wider region. Finally, it has added revenue, partly through ticket sales and advertising, and partly by making our campus a more attractive destination for summer conferences.

To support and encourage this vibrant learning community, the College has invested in significant upgrades and additions to campus facilities. The College Center (Mercy and Heffernan Halls) is the vibrant hub of campus. The learning commons in Mercy Hall provides students with information resources, technical assistance, and spaces where they can work individually and in groups on projects of varying complexity and purpose. The upper level of Heffernan Hall is alive with students, faculty, and staff gathering for meals, for relaxation, and for conversation. The sky bridge that connects Mercy and Heffernan halls provides for convenient passage between these buildings and in all seasons and symbolizes the connections that exist between the various parts of the learning experience. This same symbolism is found on the lower level of the Mercy east wing, which houses the College’s Career Center, the Mercy Center, and our new chapel. In the Mercy Center are spaces and services for people of all faiths to pray and grow in their personal relationships with God and each other.

Across the campus green from the Campus Center, the College’s newest academic building, with dedicated space for our science program and other programs, is equally busy as students and faculty gather throughout the day and evening for classes, small group meetings, and advising sessions among other activities. The design of the teaching and learning spaces here have been informed by the insights that we have gathered from our intentional and self-reflective practice and our commitment to sustainability.

In order to accommodate the College’s residential population, new living spaces have been built. The quads have been replaced with an apartment complex that provides more independent living options for upper-class students. Because of the way these units are designed, they can be occupied by students during the academic

year or be available to house others over the summer months, providing an additional source of revenue for the College. A new multi-story residence hall designed for first-year students now occupies the space adjacent to Saint Joseph's Hall, which has been repurposed for much-needed administrative office space.

Across Whites Bridge Road, the fully renovated Gowen Farm complex is now a Welcome and Community Outreach Center with event and gallery space. The stone barn is used on a regular basis throughout the year for lectures, concerts, and dinners. To provide adequate facilities for Pearson's Farm, which has a higher profile than in the past, a new barn structure has been erected further from the road. In addition to the spaces for the staff and animals, the barn has spaces for the kinds of programming Pearson's Farm is increasingly known for throughout the region.

To support the College's commitment to developing mission-aligned businesses that will help diversify our revenue stream and provide opportunities for students to "earn and learn," Saint Joseph's College now has a "life-long learning community" on campus. This retirement community is a key element of Saint Joseph's commitment to being a multi-generational learning community and complements our commitments to wellness and sustainability. Residents, who have various housing options from cottages to those that offer more comprehensive support, have access to classes offered on campus as part of our undergraduate program, but also to all other of the other educational (credit and non-credit) and cultural programming on campus. Additionally, residents have opportunities to serve as mentors to our students and to be involved in the life of the community in a variety of ways. The overall program is designed to encourage its participants to remain "well" across their lives. Located on the College property immediately to the west of Route 35, the life-long learning community's administrative offices share space with the day care/child development center that enrolls the children of members of the College community as well as children whose families live in the surrounding communities. This facility also is a place where our students can "earn and learn."

Another mission-aligned venture is our new hotel and event center, which has created opportunities for the development of new academic programs in such areas as hospitality and eco-tourism, as well as providing another venue where students can earn and learn. The lakefront has been developed in conjunction with the hotel and conference center, and now supports a four-season recreation program for students, faculty, staff, and visitors.

In addition to the lakefront development, the hotel and conference center has provided the impetus for expanding our other campus recreational and athletic resources. The all-weather dome adjacent to the Alford Center provides year-round access to indoor multi-sport courts (basketball, tennis, etc.) and can also serve as an indoor practice space on a limited basis. North of Westerlea Way, the new multi-sport turf fields now provide suitable competition and practice space for men's and women's soccer and lacrosse. Spectators have access to comfortable seating and restroom facilities at this location. The practice field adjacent to the competition field is available to recreational and intramural use and is also available for limited use by local youth leagues and groups.

As a result of this decade of development, Saint Joseph's College is now widely recognized as an "exemplary 21st-century, Catholic, liberal arts college in the Mercy tradition." The College's willingness to meet the challenges of the moment in ways that recognize and respect our history, tradition, and core commitments at the same time as they appreciate the reality of a dynamic future means that we are well-positioned to continue realizing and *Sustaining the Promise* that is Saint Joseph's College.

V. Strategic Goals

The six "strategic goals" of *Sustaining the Promise* articulate particular outcomes that align with the institution as described in the Board's vision statement and strategic narrative. The first goal is foundational and the other five should be understood as revolving around and interconnecting with it.

Goal: Saint Joseph's College will be recognized as an exemplary, 21st-century, Catholic, liberal arts college in the Mercy tradition.

The current climate of questioning and change in higher education is a source of worry for many institutions as decades-old practices and attitudes are called into question. But at Saint Joseph's College, we see in this a wonderful opportunity to take a leadership role in the essential work of reimagining what higher education will look like in the future. Our heritage of balancing our core values and commitments with innovation and entrepreneurial activity, allow us to be thought and practice leaders in such areas as educational program design and delivery, learner-centered education, and contextualized learning (learning that looks for and at the essential connection between product and process). Framing these and other core issues in terms of Saint Joseph's Catholic identity, our liberal arts orientation, and our Sisters of Mercy heritage and tradition, will allow us to become an institution of distinction.

Goal: Saint Joseph's College will be a diverse, multi-generation learning community.

Learning can happen anywhere and in any context, but colleges are places where people come together to learn about the world in all its richness and to learn from one another. That quality of that learning is enhanced by the diversity of perspectives and life experiences we bring to our encounters with both the world and with each other. This understanding encourages us to recognize but not over-value the traditional distinctions of expert and novice, teacher and student, supervisor and supervisee. The landscape of Saint Joseph's diverse learning community can be mapped in terms of age and experience, gender, economic, geography, and ethnic and racial considerations.

Goal: Saint Joseph's College is a highly evolved learning community.

As a highly evolved learning community, Saint Joseph's College will be characterized by a deep appreciation for and use of a wide range of learning practices that are individual, unit, and community focused. At every level,

our learning practices are grounded in self-awareness and self-reflection. We become more effective learners (and teachers) as we become more aware of the multiple ways that we learn and better able to articulate what the goals and outcomes of our learning are. At Saint Joseph's, we are committed to ongoing improvement that is measurable, that is strategic, and that benefits us both as individuals and as members of the Saint Joseph's and other communities. We are pleased to share what we learn, and what we learn about how we learn and improve, with others.

Goal: Saint Joseph's will be recognized as a "learning destination."

Because of the special ways that the Saint Joseph's College community understands and talks about learning, and because we provide intentional/purposeful structures for learning of all kinds, Saint Joseph's College is widely recognized not only for the context of our educational programs but also for the ways these programs are conceptualized, designed, and delivered. Our degree programs at the undergraduate and graduate levels, our continuing and professional education programs, our life-long learning opportunities, our co-curricular and experience-based learning options are all framed by our Catholic identity, liberal arts orientation, and Mercy traditions. As a result, individual learners of all ages and those who want to learn more about our special kind of learning community see Saint Joseph's as "learning destination" whether they visit our virtual environment or our lakeside campus.

Goal: Saint Joseph's College will be financially sound.

Financial stability is an essential element in the College's long-term sustainability. Financial stability allows us to look toward the future with confidence and creativity, knowing that we are positioned to respond in any given budget cycle to an increasingly volatile higher education marketplace in an uncertain economy. The College's core financial functions, from planning and budgeting to tracking and reporting, reflect the discipline necessary to inspire confidence both within and beyond the College community. On an annual basis, revenue from our core activities not only covers our core expenses but is able to fund opportunities keyed to strategic progress. Non-core annual revenue is another source of strategic progress funding as well as being a source of capital funding.

Goal: Saint Joseph's College will be recognized as a "Best Place to Work."

While Saint Joseph's College is blessed with a wonderful history and a singular setting, our most valuable asset are the members of the College community. Our recognition of this reality and our deep appreciation for what each one of us contributes to the College's learning community and to our engagement with students is reflected in our governance and decision-making systems, our personnel policies, our opportunities for personal and professional growth, and our compensation and reward and recognition plans. Saint Joseph's faculty and staff are more than simply "motivated." They are "engaged" in the important work that makes Saint Joseph's a strong institution today and an even stronger one tomorrow and are proud of their membership in the College community.

VI. Initiatives

The seven “strategic initiatives” are integral to *Sustaining the Promise* and are designed to position or re-position Saint Joseph’s College so that we are better able to achieve our six Strategic Goals. These initiatives have more than one objective and often consist of complex sets of tasks involving people from a variety of offices, units, or constituencies at the College. They are designed to enhance and nurture cooperation, collaboration, strategic thinking, and strategic action across the College

Each of the strategic initiatives has one or more sets of “objectives,” “tactics,” and assessment “metrics.” “Objectives” articulate institutional characteristics that are either quantitative or qualitative. Activities designed to achieve these objectives are known as “tactics,” and all tactics have specific assessment “metrics” that will allow us to gauge, in a timely way, the effectiveness of our strategic activity.

Because *Sustaining the Promise* establishes a dynamic, rolling planning environment at Saint Joseph’s with “change” at its core, it is important to note which parts of the plan are stable and which are subject to change and revision as the College progresses. The Goals, Initiatives, and related Objectives are stable. The Tactics and the related assessment Metrics are subject to revision as part of the regular review of strategic progress. There is obviously nothing to be gained by continuing to pursue activities that are not having the desired, strategic results.

The relationship of these initiatives to the strategic goals can be seen in the matrix in Appendix B. The objectives, tactics, and metrics associated with each of the strategic initiatives can also be found in Appendix B.

Initiative 1: Stewarding Our Enrollment

Our students (current, past, and future) are part of the living endowment of Saint Joseph’s College. A healthy, thriving community of students is essential for the well-being of the college. What we invest in our students will pay significant intellectual, cultural, spiritual, and economic dividends both today and well into the future. Fully aware of the intrinsic value of each of our students, we also realize their importance for the effective day-to-day functioning of the College in all of its aspects. For this reason we are committed to the success of an even greater percentage of those who choose to study with us at any level, both while they are students and after they graduate.

Under this strategic initiative, we will establish ambitious and achievable goals for retention and completion and explore and develop ambitious and sustainable models for student support and success that are built on an understanding of where our students are coming from and where they are going. Every office, unit, and department at the College and all individuals recognize the important roles that they have in helping students to succeed.

Initiative 2: Stewarding the Faculty and Staff Community

Our faculty, staff, and volunteer communities are also part of the College's living endowment. Our staffing models, structures, policies, and practices should reflect the understanding that they are also investments in the college's present and future.

Under this strategic initiative, we will develop and implement a series of sustainable activities and processes that will strengthen our understanding of how each of us contributes to the College's success, how the College recognizes and rewards our contributions, and the ways in which the College is committed to our continuing growth and development both as individuals and as members of the College community.

Initiative 3: Enhancing and Diversifying Our Revenue Streams

An organization of any kind needs increasing revenue to support its continuing health. For the College to be healthy, we need to balance the need for increased revenue with the awareness that our current level of dependence on student revenue is not sustainable.

Under this strategic initiative, the College will work to increase revenue from other existing sources (philanthropy, grants, and auxiliary income) and develop additional revenue streams through creative and entrepreneurial activities. And because we cannot move toward a future we have not planned for, we will develop a revenue model with clear and ambitious, yet achievable targets for each segment of the revenue stream.

Initiative 4: Stewarding Our Campus Environment

The natural beauty of Saint Joseph's College is undeniable, and we are aware of our stewardship responsibilities in relation to it. But we are also aware of a related set of responsibilities in relation to our built environment. In order to maximize the effect of the Saint Joseph's experience, we need to have campus facilities that are aligned with our core values and that are an intentional contributor to the continuing growth and development of all members of the College community.

Under this strategic initiative, we will undertake a series of planning and development (or redevelopment) projects that will result in a 21st Century campus to support our 21st Century educational endeavor.

Initiative 5: Developing a 21st Century Educational Program

Saint Joseph's College's educational program needs to be as intentional and focused as every other aspect of our enterprise. All of our courses of study, at every level, need to reflect the College's identity as a Catholic, liberal arts college, in the Mercy tradition. But our educational program is not simply a matter of what we are studying; it is also a matter of how we are teaching and how we are learning. The "how" of our educational program also needs to reflect our Catholic, liberal arts, and Mercy identity.

Under this strategic initiative, we will rebuild our undergraduate program and establish a framework for sustainable program growth at all degree levels and in both the credit and other-than-credit spheres.

Initiative 6: Stewarding Our Legacy

Saint Joseph's can no longer afford to be a "best kept secret." This way of thinking about the College does justice to neither the past nor the present, and it is a serious obstacle to a bright and prosperous future. We need to celebrate who we have been, who we are, and our aspirations for the future, and we need to invite others to join us in that celebration.

Under this strategic initiative, we will undertake a series of activities and projects that will strengthen the College's identity both internally and externally. This will require us to engage in sustained conversation that will give voice to those attributes, qualities, and characteristics that make Saint Joseph's the special place it is and that will become part of the "story" we will share with the world.

Initiative 7: Institutionalizing Our Commitment to Excellence

Unlike "perfection," which is unattainable in this world, "excellence" is something to which we can and should aspire. A commitment to pursue excellence requires us to engage in the honest and realistic assessment of who and where we are, to set ambitious but achievable goals, and to identify exemplars suited to our situation. The sustained pursuit of excellence requires us to engage in serious, structured, and purposeful self-reflection and to regularly recommit ourselves to movement forward. It also provides opportunities to celebrate our progress and to learn from our missteps.

Under this strategic initiative, we will develop sustainable systems for establishing starting points and goals, for developing measureable targets and appropriate ways to assess our efforts, and for using the results of our assessments to improve our practice in a variety of areas at the individual and the communal level.

VII. Implementation and Assessment

All of the documents related to the implementation and assessment of *Sustaining the Promise* can be found in Appendix C.

A. Strategic Progress Calendar

The "Strategic Progress Calendar" provides a graphic way to see the relationship of the strategic initiatives across time. As such, it is both a planning and an accountability tool.

The calendar uses Gantt Chart techniques to show the projected beginnings and ends of each of the strategic tactics from fall 2014 through spring 2021. The darker blue shading indicates that that tactic is actively being pursued; the "X" indicates when the associated metric is projected to be achieved. In instances where activity

associated with the tactic continues beyond the achievement the metric, that fact is indicated by lighter blue shading.

Because all of the strategic activity is interconnected and linked to the strategic financial model, it is important to note that our ability to pursue a number of tactics in the out-years of the plan presumes the successful achievement of our metrics in the earlier years.

B. Strategic Budgeting and Funding the Plan

A foundational element of *Sustaining the Promise* is the dynamic financial model that has been developed as part of the plan. Its output is presented in “planning budgets” (as opposed to the “draft budgets” associated with annual budget cycles) for Fiscal Years 2016 through 2019. These planning budgets include the expenses associated with each year’s activities aimed at “strategic progress” in addition to the regular, recurring annual expenses. Its dynamic design allows us to see the short and long-term results of individual strategic initiatives on the College’s financial condition. The Strategic Financial Planning Results document can be found in Appendix C.

Because *Sustaining the Promise* is a comprehensive strategic plan and includes all aspects of the College, funding for the plan will come from a range of sources: operating revenues, annual capital funding, philanthropic giving, existing College resources, and borrowing.

The strategic financial model projects growth in annual operating revenue from \$38 million for FY 2015 to \$44.3 million in FY 2019. The preliminary modeling for the aspiration 2020–2024 window projects operating revenue of \$55.6 million in FY 2024.

On the expense side, projected annual operating expenses grow from \$35.2 million for FY 15 to \$41.7 million for FY 2019 and \$52.1 million in FY 2024.

The College’s ability to meet the revenue and expense projections in the planning budgets is another accountability measure.

C. Key Performance/Strategic Indicators

The College Key Performance/Strategic Indicators present three years of longitudinal internal data in a number of institutional significant areas (Enrollment, Student Development, Finance, and Advancement). They also contain a single year of comparison data (where available) for our Comparison Group schools.

Updated annually in the fall, the Key Performance/Strategic Indicators are another measure of progress and accountability tool. The College’s Key Performance Indicators can be found in Appendix D.

**D. Comparison Group**

The College's Strategic Comparison Group contains schools that can be thought of as peers and/or aspirants and has been developed with the primary goal of providing us with external benchmarks for the Strategic and Key Performance Indicators. The 10 schools in the group were identified through a process that considered current and projected Saint Joseph's College budgets, their Carnegie Classification (all are Masters level institutions), and the College's special identity as a Catholic college (all are Catholic; four are sponsored by the Sisters of Mercy).

The 10 institutions are Assumption College, College of Mount Saint Vincent, Dominican College of Blauvelt, Georgian Court University, Misericordia University, Salve Regina University, University of Saint Francis, University of Saint Joseph, Viterbo University, and Walsh University. Additional information about these schools can be found in Appendix D.

Appendix A

Cascading Strategic Plans

Institutional

GOALS

INITIATIVES

OBJECTIVES

Major Functional Area
(ex. Learning/Academic Affairs)

Initiatives

Consistently enroll 1200 students in the
Sebago Lake undergraduate program

TACTICS

Recruit qualified entering classes

METRIC

Entering classes (FTFT) of 325

Consistently enroll 1200 students in the
Sebago Lake undergraduate program

Objectives

Recruit qualified entering classes

Tactics
Developed at Major Functional Area
level

Metrics
Developed at Major Functional Area
level



Unit/Department (ex. Admission)

Initiatives

Recruit qualified entering classes

Objectives

Entering classes (FTFT) of 325

Tactics

Developed at Unit/Department level

Targets

Developed at Unit/Department level

Appendix B

Goal-Initiative

Map

	Strategic Initiatives							
	Stewarding Our Enrollment	Stewarding the Faculty and Staff	Enhancing and Diversifying Our Revenue Streams	Building a Sustainable 21st Century Educational Program	Stewarding Our Campus Environment	Stewarding Our Legacy	Institutionalizing Our Commitment to Excellence	
Strategic Goals								
Saint Joseph's College will be								
recognized as an exemplary 21st Century, Catholic, liberal arts college in the Mercy tradition	X	X	X	X	X	X	X	X
a vibrant, diverse, multi-generational learning community	X	X	X	X	X	X	X	X
a highly evolved learning community	X	X	X	X	X	X	X	X
recognized nationally as a "learning destination"	X	X	X	X	X	X	X	X
will be financially sound	X	X	X	X	X	X	X	X
will be recognized as a "Best Place to Work"	X	X	X	X	X	X	X	X

Appendix B • Strategic Initiative Details

Strategic Initiative 5										
Stewarding Our Campus Environment										
								<i>Cost</i>	<i>Source of funds</i>	
Objective 5.1	The College has a Master Facilities Plan that aligns with the Strategic Plan and its goals and that emphasizes "sustainability"									
5.1.A	Tactic	Contract with a firm to renew the Master Facilities Plan						\$100,000	capital	
	Target	Fall 2015								
Objective 5.2	The College has an appropriate utility and technology infrastructure plan									
5.2.A	Tactic	Develop technology and utility infrastructure plan						NAF	capital	
	Target	Spring 2015								
Objective 5.3	The College is an attractive, easy-to-navigate space for visitors and community members									
5.3.A	Tactic	Develop and implement campus landscape and way-finding plan						\$1m	campaign/capital	
	Target	TBD								
Objective 5.4	The College has appropriate academic and student development space									
5.4.A	Tactic	Renovate Mercy and Heffernan for the Campus Center						\$24.5m	campaign	
	Target	TBD								
5.4.B	Tactic	Plan for an additional academic building to the northwest of Alford Hall						TBD	campaign	
	Target	TBD								
Objective 5.5	The College has appropriate student residential options									
5.5.A	Tactic	Develop a campus residential plan for number and type of beds						TBD	operating	
	Target	Fall 2015								
5.5.B	Tactic	Replace "Quads" with apartment-style upperclass housing						TBD	campaign/capital	
	Target	TBD								
5.5.C	Tactic	Design and build new first-year student housing complex						TBD	campaign/capital	
	Target	TBD								
Objective 5.6	The College has appropriate office space for faculty and staff									
5.6.A	Tactic	Renovate Saint Joseph's Hall						TBD	campaign/capital	
	Target	TBD								
Objective 5.7	The College has appropriate athletic/recreational space									
5.7.A	Tactic	Develop at least two turf fields on campus						\$2.5m	campaign/capital	
	Target	TBD								
5.7.B	Tactic	Build a multi-purpose field-house						TBD	campaign/capital	
	Target	TBD								
5.7.C	Tactic	Develop appropriate facilities to support four-season lake programming						TBD	campaign/capital	
	Target	TBD								
Objective 5.8	The College has appropriate facilities to support its "mission-aligned businesses"									
5.8.A	Tactic	Plan/develop an expanded/enhanced Pearson's Town Farm						TBD	campaign/capital	
	Target	Spring 2014								
5.8.B	Tactic	Plan/develop a hotel/conference center						\$13M	capital	
	Target	Spring 2014								
5.8.C	Tactic	Plan/develop an active adult/retirement/lifelong learning community						TBD	capital	
	Target	Spring 2014								
5.8.D	Tactic	Plan/develop a child development center						TBD	capital	
	Target	TBD								

Appendix C

Strategic Progress Calendar

	Fall 2014	Spring 2015	Fall 2015	Spring 2016	Fall 2017	Spring 2018	Fall 2018	Spring 2019	Fall 2019	Spring 2020	Fall 2021	Spring 2022	Fall 2023	Spring 2024
Strategic Initiative 1 - Stewarding Our Enrollment														
Objective	1.1 - Consistently enroll 1200 full-time students in the Sebago Lake undergraduate program													
1.1.A													X	
	Tactic: Recruit qualified entering classes													
1.1.B														
	Metric: Entering classes (ETF) of 325													
	Tactic: Expand geographic profile of entering classes													
1.1.C							X							
	Metric: Out-of-state enrollments equal to 60% of entering class													
	Tactic: Recruit qualified transfer students													
1.1.D							X							
	Metric: Recruit and enroll 50 full-time students annually													
	Tactic: Improve retention													
1.1.E														
	Metric: Improve first-to-second year retention rates to 95%; second-to-third year rates to 83%; third-to-fourth year rates to 79%													
	Tactic: Improve graduation rates													
Objective	1.2 - Consistently enroll 2000 students (headcount) in undergraduate online program													
1.2.A														
	Tactic: Establish program-based enrollment plans (including completion rate and time-to-degree metrics) for all online undergraduate programs													
	Metric: Accomplished by end of Spring 2016													
Objective	1.3 - Consistently enroll 3000 students (headcount) in online graduate programs													
1.3.A														
	Tactic: Establish program-based enrollment plans (including completion rate and time-to-degree metrics) for all online graduate programs													
	Metric: Accomplished by end of Spring 2016													
Objective	1.4 - The College's organizational culture recognizes the centrality of enrollment management practices to our long-term viability and success.													
1.4.A														
	Tactic: Each office/department (academic and other) level strategic/assessment plan explicitly addresses that unit's obligations and responses to our shared responsibilities for enrollment management.													
	Metric: Accomplished by end of Spring 2016													
1.4.B														
	Tactic: The Career Services Office, working in conjunction with the Alumni Relations Office, will provide services to graduates of the College													
	Metric: Accomplished by Fall 2015													
Strategic Initiative 2 - Stewarding the Faculty and Staff Community														
Objective	2.1 - The College workforce is characterized by (1) the right number of people (2) doing important work for which they are qualified and trained, and (3) who are committed to our students' success, (4) the success of their unit, and (5) the success of the College.													
2.1.A		X												
	Tactic: Develop and use a strategic staffing model													
	Metric: Approved by Spring 2015; in use for FY 2016 and thereafter													
2.1.B														
	Tactic: Develop and implement a college-wide performance management system													
	Metric: Implemented during Spring 2016													
2.1.C														
	Tactic: Implement a competitive merit-based compensation and benefits program													
	Metric: Program developed by Spring 2017; implemented in FY 18 and thereafter													
2.1.D														
	Tactic: Develop, fund, and implement a professional development program that addresses personal, unit, and College needs													
	Metric: Implemented by Fall 2016													
Objective	2.2 - The College's governance system recognizes and gives voice to all of the appropriate constituencies													
2.2.A														
	Tactic: Revise the College's governance system													
	Metric: Revised governance system in use by Fall 2017													
Objective	2.3 - Academic program resources are organized to create viable communities of faculty members in aligned program areas.													
2.3.A														
	Tactic: Implement a "divisional" or "area" administrative structure for academic programs													
	Metric: Fall 2016													

Appendix C

Strategic Progress Calendar

	Fall 2014	Spring 2015	Fall 2015	Spring 2016	Fall 2017	Spring 2018	Fall 2018	Spring 2019	Fall 2019	Spring 2020	Fall 2020	Spring 2021	Fall 2021	Spring 2022	Fall 2022	Spring 2023	Fall 2023
Strategic Initiative 3 - Enhancing and Diversifying Our Revenue Streams																	
3.1.A Tactic: Reduce discount rate for FTFT Sebago Lake students to 48% or lower Metric: Target discount rate achieved by Fall 2024																	
3.1.B Tactic: Reduce composite discount rate for Sebago Lake students to 48% or lower Metric: Target discount rate achieved by Fall 2024																	
3.1.C Tactic: Improve retention Metric: Improve first-to-second year retention rates to 95%; second-to-third year rates to 83%; third-to-fourth year rates to 79%																	
Objective 3.2 - The Institutional Advancement/Development function provides a significant source of revenue for the College																	
3.2.A Tactic: Increase giving to the Annual Fund across all constituencies Metric: A cumulative increase of \$25,000 annually		X															
3.2.B Tactic: Develop and implement a viable Planned Giving program Metric: Program implemented by Fall 2015			X														
3.2.C Tactic: Develop and implement a Major Gift Program Metric: Program implemented by Fall 2015			X														
3.2.D Tactic: Develop and implement a viable Foundations and Grants program Metric: Program implemented by Fall 2015			X														
3.2.E Tactic: Plan and conduct a Comprehensive/Capital Campaign Metric: Campaign activity Fall 2015-Spring 2022																	
Objective 3.3 - The College Events and Conference Office provides a significant source of revenue for the College																	
3.3.A Tactic: Develop and pro-actively market an event and conference program Metric: Implement during Spring 2015		X															
Objective 3.4 - The College's "mission-aligned businesses" provide a significant source of revenue for the College																	
3.4.A Tactic: Conduct feasibility and other planning studies for hotel/conference center, life-long learning community Metric: Accomplished, Spring 2014	X																
3.4.B Tactic: Develop/pursue business plan for hotel/conference center Metric: Plan developed during 2015-2016				X													
3.4.C Tactic: Develop/pursue business plan for life-long learning community Metric: Plan developed during 2016-2017																	
3.4.D Tactic: Develop/pursue business plan for event/hospitality center Metric: Plan developed during 2014-2015		X															

Appendix C

Strategic Progress Calendar

	Fall 2014	Spring 2015	Fall 2015	Spring 2016	Fall 2016	Spring 2017	Fall 2017	Spring 2018	Fall 2018	Spring 2019	Fall 2019	Spring 2020	Fall 2020	Spring 2021	Fall 2021	Spring 2022
Strategic Initiative 4 - Building a Sustainable 21st Century Program																
Objective	4.1 - The College's educational program has a coherent identity and focus															
4.1.A	Tactic: Review and revise College student learning outcomes (all-institutional, undergraduate, and graduate)															
		X														
4.1.B	Metric: Faculty Senate approval: Spring 2015															
4.1.C	Tactic: Establish the Center for the Study of Human and Natural Environments															
							X									
4.1.C	Metric: Established by Fall 2017															
											X					
4.1.C	Metric: Established by Fall 2017															
Objective	4.2 - The College offers a competitive and compelling undergraduate experience to students at our Sebago Lake campus															
4.2.A	Tactic: The standard undergraduate degree will require 120 credits															
							X									
4.2.A	Metric: Faculty Senate approval: Spring 2015; Implemented Fall 2016															
4.2.B	Tactic: Major programs will be sized to allow most students to complete two majors or a major and a minor.															
							X									
4.2.B	Metric: By Fall 2016															
4.2.C	Tactic: The undergraduate program will incorporate "high-impact" practices															
							X									
4.2.D	Metric: By Fall 2016															
4.2.D	Tactic: The College will offer between 20 and 25 undergraduate majors through our program at Sebago Lake															
							X									
4.2.D	Metric: By Fall 2016															
Objective	4.3 - The College offers a range of online undergraduate programs for students at all stages in their degree pursuit															
4.3.A	Tactic: Develop a strategic plan for online undergraduate program															
4.3.A	Metric: Plan developed by Spring 2016															
4.3.A	Tactic: The College offers multi-disciplinary masters degree programs focusing on emerging challenges and issues in the contemporary world in addition to professional programs															
							X									
4.3.A	Metric: Develop a strategic plan for online graduate program															
4.3.A	Metric: Plan developed by Spring 2016															
Objective	4.5 - The College offers doctoral level programs in areas of traditional program strength															
4.5.A	Tactic: Conduct a feasibility study for a doctoral program in nursing and/or health-related area															
4.5.A	Metric: Study conducted during 2016-2017															
Objective	4.6 - The College offers a range of post-secondary level educational programs in other-than-for-credit format															
4.6.A	Tactic: Establish a task force to explore and develop this concept															
4.6.A	Metric: Task Force report due by Spring 2016															
4.6.A	Metric: Task Force report due by Spring 2016															

Appendix C

Strategic Progress Calendar

	Fall 2014	Spring 2015	Fall 2015	Spring 2016	Fall 2016	Spring 2017	Fall 2017	Spring 2018	Fall 2018	Spring 2019	Fall 2019	Spring 2020	Fall 2020	Spring 2021	Fall 2021	Spring 2022
Strategic Initiative 5 - Stewarding Our Campus Environment																
Objective	5.1 - The College has a Master Facilities Plan that aligns with the Strategic Plan and its goals and that emphasizes "sustainability"															
5.1.A	Tactic: Contract with a firm to renew the Master Facilities Plan															
		X														
	Metric: Report delivered during Spring 2015															
Objective	5.2 - The College has an appropriate utility and technology infrastructure plan															
5.2.A	Tactic: Develop utility infrastructure plan															
	X															
	Metric: Plan developed by Spring 2015															
5.2.B	Tactic: Develop technology infrastructure plan															
			X													
	Metric: Plan developed by Spring 2016															
Objective	5.3 - The College is an attractive, easy-to-navigate space for visitors and community members															
5.3.A	Tactic: Develop and implement campus landscape and way-finding plan															
	X															
	Metric: Develop and implement first phase by Spring 2015															
Objective	5.4 - The College has appropriate academic and student development space															
5.4.A	Tactic: First-phase renovation of Heffernan and Mercy as part of the Campus Center Project															
	Metric: Accomplished by Fall 2016															
5.4.B	Tactic: Plan for an additional academic building to the northwest of Alford Hall															
				X												
	Metric: Planning conducted: Spring 2020-2024															
Objective	5.5 - The College has appropriate student residential options															
5.5.A	Tactic: Develop a campus residential plan for number and type of beds															
	X															
	Metric: Plan completed, Spring 2015															
5.5.B	Tactic: First phase of new upperclass housing															
						X										
	Metric: Housing available for Fall 2017															
5.5.C	Tactic: Second phase of new upperclass housing															
													X			
	Metric: Housing available for Fall 2020															
5.5.D	Tactic: Replacement housing for Saint Joseph's Hall															
															X	
	Metric: Housing available for Fall 2022															
Objective	5.6 - The College has appropriate office space for faculty and staff															
5.6.A	Tactic: Renovate Saint Joseph's Hall															
	Metric: Space available by Fall 2022															
Objective	5.7 - The College has appropriate athletic/recreational space															
5.7.A	Tactic: Develop a turf field on campus															
		X														
	Metric: Available Fall 2015															
5.7.B	Tactic: Build a multi-purpose field-house with turf															
	Metric: Available Fall 2017															
5.7.C	Tactic: Develop appropriate facilities to support four-season lake programming															
	Metric: Plan presented by Spring 2016															
Objective	5.8 - The College has appropriate facilities to support its "mission-aligned businesses"															
5.8.A	Tactic: Develop plan for expanded/enhanced Pearson's Town Farm															
	X															
	Metric: Plan presented by Spring 2015															

Appendix C

Strategic Progress Calendar

	Fall 2014	Spring 2015	Fall 2015	Spring 2016	Fall 2016	Spring 2017	Fall 2017	Spring 2018	Fall 2018	Spring 2019	Fall 2019	Spring 2020	Fall 2020	Spring 2021	Fall 2021	Spring 2022
Strategic Initiative 6 - Stewarding Our Legacy																
Objective	6.1 - Saint Joseph's College is widely recognized in its role as Maine's only Catholic college															
6.1.A																
	Tactic: Establish the Center for 21st Century Faith and Spirituality															
	Metric: Established by Fall 2017															
6.1.B							X									
	Tactic: Develop partnerships to support Maine's K-12 Catholic schools															
	Metric: Partnerships established by Fall 2015															
6.1.C		X														
	Tactic: Conduct out-reach to parishes throughout Maine															
	Metric: Beginning Spring 2014															
6.1.D																
	Tactic: Include in marketing materials, including new web page															
	Metric: New web content; January 15, 2015															
Objective	6.2 - Saint Joseph's is widely recognized as a Mercy college															
6.2.A										X						
	Tactic: Develop and implement a "Mercy Leadership" program for key leadership positions at all levels of the College structure (Board through Campus Life)															
	Metric: Program implemented for Academic Year 2015-2016															
6.2.B																
	Tactic: Ensure a strong mission education component in all orientation programs															
	Metric: Accomplished by Fall 2015															
6.2.C			X													
	Tactic: Include mission-oriented elements in performance reviews at all levels in the College															
	Metric: Accomplished by Spring 2016															
6.2.D																
	Tactic: Conduct CMHE Mission Audit															
	Metric: Study conducted; Team visit; Spring 2021															
6.2.E																
	Tactic: Include in marketing materials, including new web page															
	Metric: New web content; January 15, 2015															
Objective	6.3 - Saint Joseph's will be widely recognized as a "learning destination"															
6.3.A		X														
	Tactic: Establish the Center for the Study of Human and Natural Environments															
	Metric: Establish by Fall 2017															
6.3.B																
	Tactic: Develop and offer "other-than-degree" programming for a broad spectrum of learners															
	Metric: Program in place by Fall 2016															
Objective	6.4 - The College has an integrated communications strategy using multiple platforms to reach a wide audience															
6.4.A																
	Tactic: Develop an integrated website for all College programs (on-campus and on-line)															
	Metric: New integrated web page by January 15, 2015															
6.4.B																
	Tactic: Develop a series of constituent-focused newsletters for regular distribution															
	Metric: In use by Spring 2015															
Objective	6.5 - The College will be an active presence in discussions with local, state, and federal lawmakers about matters of interest and concern to the Saint Joseph's community.															
6.5.A																
	Tactic: The College will develop a Government Relations function with specific objectives, expectations, and resources															
	Metric: Program developed/implemented, Spring 2015															
Objective	6.6 - The College will be an active presence in local community groups.															
6.6.A																
	Tactic: Specific members of the College community (staff and/or faculty) will be named as liaisons to community groups.															
	Metric: Accomplished, Spring 2015															
Strategic Initiative 7 - Institutionalizing Our Commitment to Excellence																
Objective	7.1 - The College is committed to "continuous improvement" in all of its facets															

Appendix C

Strategic Financial Planning Results

Five Fiscal Years, 2015 - 2019

Fall FY	2014 2015 Budget	2015 2016 Projected	2016 2017 Projected	2017 2018 Projected	2018 2019 Projected
Revenues					
Student Revenues, net of aid	\$35,041,745	\$35,213,583	\$38,437,321	\$39,508,339	\$41,898,678
Gifts, Grants, and Releases	\$1,441,745	\$1,504,951	\$1,568,105	\$1,618,105	\$1,668,105
Investment Income	\$350,390	\$199,859	\$167,919	\$163,839	\$179,070
Other	\$1,261,980	\$1,746,981	\$1,751,982	\$1,857,108	\$1,862,362
Total Revenues	\$38,095,861	\$38,665,374	\$41,925,327	\$43,147,392	\$45,608,216
Expenditures, Natural Classification Groups					
Compensation					
Salaries & Wages	\$20,399,157	\$20,050,841	\$21,156,807	\$21,583,647	\$22,001,076
Benefits	\$5,208,937	\$4,991,583	\$5,312,531	\$5,461,923	\$5,616,045
Total Compensation	\$25,608,094	\$25,042,424	\$26,469,338	\$27,045,570	\$27,617,121
General Operating Costs	\$8,301,751	\$8,676,455	\$9,350,638	\$9,818,347	\$10,032,651
Utilities	\$1,199,552	\$1,154,291	\$1,282,398	\$1,400,708	\$1,431,864
Contingency	\$175,209	\$704,272	\$864,840	\$987,708	\$1,152,214
Total Expenses & Other Outflows	\$35,284,606	\$35,577,442	\$37,967,214	\$39,252,334	\$40,233,849
EBIDTA	\$2,811,254	\$3,087,932	\$3,958,113	\$3,895,058	\$5,374,367
Debt Service	\$1,848,315	\$1,843,653	\$2,620,447	\$2,601,752	\$2,567,709
Cash Flows Before Capital	\$962,939	\$1,244,278	\$1,337,666	\$1,293,307	\$2,806,657
Annual Allotment, funded by Operating Budget/Reserves*	\$925,000	\$979,500	\$1,088,500	\$1,252,000	\$1,470,000
subtotal	\$37,939	\$264,778	\$249,166	\$41,307	\$1,336,657
New Capital Projects	\$5,575,000	\$425,000	\$42,200,000	\$100,000	\$1,100,000
Cash Flows After Capital	(\$5,537,061)	(\$160,222)	(\$41,950,834)	(\$58,693)	\$236,657
Debt Service Coverage Ratio (min 1.2)	1.5	1.7	1.5	1.5	2.1
Other Information					
Interest Expense	\$875,271	\$838,862	\$1,450,382	\$1,391,458	\$1,344,755
Depreciation	\$1,928,000	\$1,974,250	\$2,020,500	\$2,066,750	\$2,113,000
Accounting Income **	\$7,983	\$274,819	\$487,231	\$436,851	\$1,916,611

Appendix D
Key Performance
Indicators

SAINT JOSEPH'S COLLEGE KEY PERFORMANCE INDICATORS

	Fall 2011	Fall 2012	Fall 2013	Comparison Group
ENROLLMENT				
CAMPUS PROGRAM				
# Freshman Applicants			1580	
% Applicants Accepted			78%	
% Accepted Who Enrolled			24%	
Average SAT Scores of Enrolled				
Math			480	
Reading			480	
% Enrolled From Maine			62%	
% Enrolled From Away			38%	
New Transfers Enrolled			21	
Total FTE Undergraduate			971	
ONLINE PROGRAM				
New Enrollments (course registrations)			1919 (3)	
Continuing Enrollments (course registrations)			7981 (3)	
FTE Undergraduate			359 (3)	
Graduate			583 (3)	
(3) Fiscal 2013				

Appendix D
Key Performance
Indicators

SAINT JOSEPH'S COLLEGE KEY PERFORMANCE INDICATORS

	Fall 2011	Fall 2012	Fall 2013	Comparison Group
STUDENT DEVELOPMENT				
CAMPUS PROGRAM				
1st to 2nd Year Retention			76% (1)	
4-Year Graduation Rate			46% (2)	
6-Year Graduation Rate			54% (2)	
Student-Faculty Ratio			12:1	
Average Class Size			16	
ONLINE PROGRAM				
Persistence Data				
Entered FY11: % Remain				
Undergraduate			70%	
Graduate			74%	
(1) Fall 2012 to Fall 2013				
(2) Students entering in Fall 2007				

Appendix D

Key Performance Indicators

SAINT JOSEPH'S COLLEGE KEY PERFORMANCE INDICATORS

	Fall 2011	Fall 2012	Fall 2013	Comparison Group
FINANCE				
Campus Program				
Net Tuition per Student FTE			\$26,476.5 (3)	
Tuition Discount Rate			46.4% (3)	
Online Program				
Net Tuition Revenue per Student FTE				
Undergraduate			\$10,501 (3)	
Graduate			\$11,520 (3)	
Endowment				
Market Value - End of Fiscal Year			\$16,328,590 (4)	
% Return			14.28%	
Academic Support as % of Total Expenses			5.20%	
Instruction as % of Total Expenses			23.71%	
Institutional Support as % of Total Expenses			22.46%	
Student Services as % of Total Expenses			21.72%	
Primary Reserve Ratio			0.56	
(Total Unrestricted Net Assets divided by Total Expenses)				
(3) Fiscal 2013				
(4) As of June 30, 2013				

Appendix D
Key Performance
Indicators

SAINT JOSEPH'S COLLEGE KEY PERFORMANCE INDICATORS

	Fall 2011	Fall 2012	Fall 2013	Comparison Group
ADVANCEMENT				
Annual Fund				
Campus Program				
# of Sebago Lake Program alumni Donors			228 (3)	
Total \$ Amount given			\$46,777 (3)	
% Participation in Annual Fund			6% (3)	
Online Program				
# of Online Program alumni donors			393 (3)	
Total \$ Amount given			\$123,613 (3)	
% Participation in Annual Fund			5% (3)	
Total Gifts, Grants, and Contracts			\$1,049,903 (3)	
(3) Fiscal 2013				

Appendix D

Strategic Performance Comparison Group

2014-2019

Institution	Location	Carnegie Classification	FY 12 Expenses	Sponsored by Sisters of Mercy
Dominican College of Blauvelt	Orangeburg, NY	Masters Smaller	\$36m	
University of Saint Francis	Fort Wayne, IN	Masters Smaller	\$38m	
Viterbo University	LaCrosse, WI	Masters Larger	\$39m	
The College of Mount Saint Vincent	Bronx, NY	Masters Smaller	\$41m	
Walsh University	North Canton, OH	Masters Medium	\$44m	
Georgian Court University	Lakewood, NJ	Masters Larger	\$45m	X
Misericordia University	Dallas, PA	Masters Medium	\$49m	X
University of Saint Joseph	West Hartford, CT	Masters Larger	\$52m	X
Salve Regina University	Newport, RI	Masters Medium	\$62m	X
Assumption College	Worcester, MA	Masters Medium	\$64m	
Saint Joseph's College	Standish, ME	Masters Medium	\$35m	X
The Strategic Performance Comparison Group is comprised of both "peer" and "aspirant" institutions. However, rather than thinking of these as distinct and separate categories, we understand "peer" and "aspirant" to be points along a continuum.				
The composite data from this comparison group will be used annually to benchmark our Key and Strategic Performance Indicators.				