Plan 2020: Gateway to the Future

Overview of Strategic Priorities 2011-12

John Smithson ’68
Interim President
October 14, 2011
Bridge Plan 2010-2012

Bridge Plan: Positioning for the Next Decade

- 1st Year Housing
- Merion Hall Renovations
- Post Learning Commons
- Investment in Curricular Innovation
Plan 2020
Strategic Initiatives

Plan 2020: Gateway to the Future

Academic Distinction & Transformative Learning
Mission & Diversity
Global & Community Engagement
Financial Health
Alumni Involvement
Facilities & Tech
Human Res.
Marketing & Image
Strategic Assets

Resources to support Plan

Financial Plan

FY12 Strategic Priorities

Academic Distinction
Athletics
Development
Enrollment Mgt
Info Tech
Marketing
Mission

Enterprise Risk Management
Financial Plan Highlights

**Total Net Assets**

<table>
<thead>
<tr>
<th>Year</th>
<th>$ in millions</th>
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</thead>
<tbody>
<tr>
<td>FY11</td>
<td>344.0</td>
</tr>
<tr>
<td>FY12</td>
<td>356.0</td>
</tr>
<tr>
<td>FY13</td>
<td>368.7</td>
</tr>
<tr>
<td>FY14</td>
<td>387.8</td>
</tr>
<tr>
<td>FY15</td>
<td>399.8</td>
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</table>

**Change in Total Net Assets**

<table>
<thead>
<tr>
<th>Year</th>
<th>$ in millions</th>
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<tbody>
<tr>
<td>FY11</td>
<td>31.8</td>
</tr>
<tr>
<td>FY12</td>
<td>12.0</td>
</tr>
<tr>
<td>FY13</td>
<td>12.8</td>
</tr>
<tr>
<td>FY14</td>
<td>19.1</td>
</tr>
<tr>
<td>FY15</td>
<td>12.0</td>
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**Unrestricted Net Assets**

<table>
<thead>
<tr>
<th>Year</th>
<th>$ in millions</th>
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<tbody>
<tr>
<td>FY11</td>
<td>199.3</td>
</tr>
<tr>
<td>FY12</td>
<td>209.8</td>
</tr>
<tr>
<td>FY13</td>
<td>217.8</td>
</tr>
<tr>
<td>FY14</td>
<td>234.3</td>
</tr>
<tr>
<td>FY15</td>
<td>241.7</td>
</tr>
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</table>
Expendable Resources and Debt

$ in millions

<table>
<thead>
<tr>
<th>Year</th>
<th>Expendable Resources</th>
<th>Debt</th>
<th>Ratio of Expendable Resources/Debt</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY11</td>
<td>212.8</td>
<td>95</td>
<td>-</td>
</tr>
<tr>
<td>FY12</td>
<td>189.1</td>
<td>86</td>
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</tr>
<tr>
<td>FY13</td>
<td>190.4</td>
<td>88</td>
<td>-</td>
</tr>
<tr>
<td>FY14</td>
<td>203.5</td>
<td>95</td>
<td>-</td>
</tr>
<tr>
<td>FY15</td>
<td>205.6</td>
<td>98</td>
<td>-</td>
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</table>
Academic Plan 2011-2014

1. Academic Distinction:
   - Centers and Programs of Excellence
   - Faculty Hiring Plan

2. Transformative Teaching & Scholarship
   - Successful outcomes – careers & grad school

3. Transformative Student Experience

4. Curricular Innovation

5. Leading from Mission: Ethics, Service & Diversity

6. Next Campaign will focus on investment in Academic Excellence
Intercollegiate Athletics Plan

1. Promote Athletics as a strategic asset to raise overall visibility and institutional reputation

2. Athletic excellence & enhanced competitiveness through scholarships, coaching and reaching conference championships annually

3. Academic success and graduation of all student-athletes; moral and leadership growth and development

4. Enhance revenues & remain excellent stewards
Development & Alumni Relations Plan

1. Engage the strong pipeline of prospective donors while building on momentum and success of “With Faith and Strength to Dare”

2. Initiate pre-campaign planning with focus on Academic Excellence

3. Begin Campaign planning phase with new President and integrate his vision

4. Refine funding priorities; define the case statements for specific goals of the Academic Plan
Undergraduate Admissions Plan 2011-14

1. Enhance recruitment and selectivity

<table>
<thead>
<tr>
<th>Metrics</th>
<th>Fall 2011 Actual</th>
<th>Fall 2012 Projections</th>
<th>Fall 2013 Projections</th>
<th>Fall 2014 Projections</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman Application Increase</td>
<td>6%</td>
<td>6 - 8%</td>
<td>6 - 8%</td>
<td>5 - 7%</td>
</tr>
<tr>
<td># Applications</td>
<td>7402</td>
<td>7845 - 7993</td>
<td>8310 – 8626</td>
<td>8861 – 9294</td>
</tr>
<tr>
<td>Admit Rate</td>
<td>78%</td>
<td>75-79%</td>
<td>71-74%</td>
<td>66-70%</td>
</tr>
<tr>
<td>Yield Rate</td>
<td>20%</td>
<td>20.4%</td>
<td>20.4%</td>
<td>20.4%</td>
</tr>
<tr>
<td>Freshman Enrollment</td>
<td>1137</td>
<td>1202</td>
<td>1225</td>
<td>1250</td>
</tr>
<tr>
<td>Transfers</td>
<td>67</td>
<td>80</td>
<td>80</td>
<td>100</td>
</tr>
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</table>
Undergraduate Admissions (cont’d)

2. Highlight student outcomes and success
3. Articulate academic strengths and values and promote them through the integrated marketing campaign
4. Improve diversity of undergraduate student body
5. Enhance the website, visit experience and communications with prospective families
Information Technology Plan

1. Focus IT to support goals of academic excellence
2. Deliver technology-based solutions that support university-wide *Plan 2020* goals
3. Optimize technology resources for greater institutional effectiveness
4. Appoint a multi-disciplinary external IT Advisory Board to study emerging technology’s impact on future delivery of higher education
Integrated Marketing Plan

Utilizing the marketing research craft the positioning statement and create an integrated Marketing Plan

- Aug/Sept: Positioning research completed; Creative firm hired
- October: Campus feedback on research
- Nov/Dec: Develop creative concepts & plan
- Feb/March: Campus internal rollout
- Spring 2012: Launch of integrated marketing effort, including a dynamic website presence
Office of Mission Strategic Plan

1. Mission and identity discussions stimulated by the Declaration of Shared Purpose of the Society of Jesus

2. Facilitate ongoing Mission formation for Board of Trustees

3. Support Diversity Plan goals including the growth of Ignatian College Connection (ICC)

4. Enhance immersion programs and faith-formation for students
Campus Master Plan Goals

Develop Campus Master Plan and phased implementation strategies to:

1. Support long-range goals in Plan 2020
2. Evaluate student body capacity and facilities utilization strategies
3. Build in flexibility for future planning
4. Develop outdoor/open space options
5. Analyze potential future property acquisition