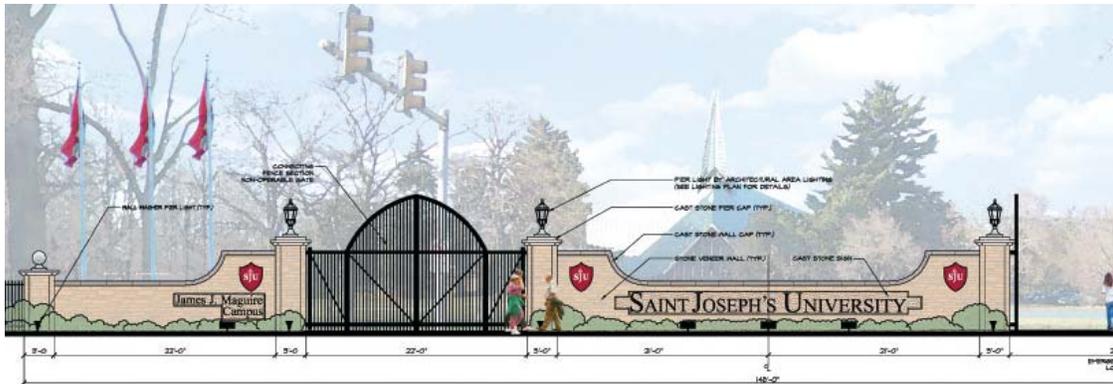




PLAN 2020: GATEWAY TO THE FUTURE
Strategic Priorities 2011-12



October 4, 2011

Strategic Priorities 2011-12

Introduction

Over the past year Saint Joseph’s University engaged in a process to identify strategic priorities that are critical to the success of the **Bridge Plan for 2010-2012** and the initial implementation of the long-range strategic plan entitled **Plan 2020: Gateway to the Future**.

The Strategic Priorities for 2011-12 represent the areas of focus and investment of resources to assure that the foundation of *Plan 2020* is achieved and that Saint Joseph’s will be positioned for future success. Each Strategic Priority has a fully detailed multi-year plan to support its goals. The plan documents in their entirety are posted on the Planning website: www.sju.edu/resources/planning

This document includes an executive summary of each of those plans. In addition, the Financial Plan has been updated for 2011-2015 and the assumptions and critical ratios are included herein.

Lastly, the Campus Master Planning process has been underway for the past year and will reflect the space and infrastructure needs to enable the plans to be successful. A summary of the goals of the Campus Master Plan are provided.

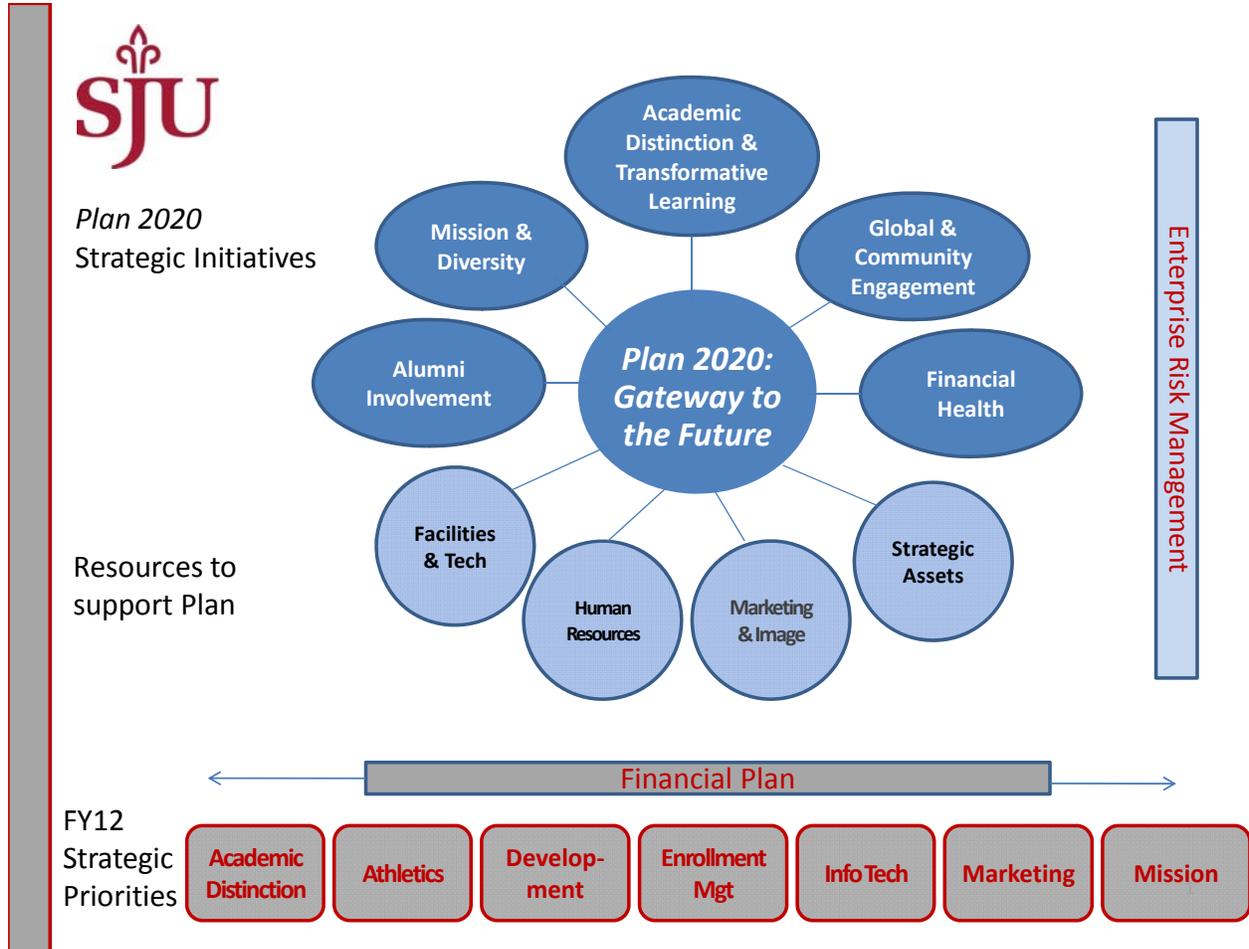
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Strategic Priorities 2011-12

Strategic Initiatives and Resources to support Plan 2020

The diagram below illustrates the major components of *Plan 2020* as well as the strategic priorities for the 2011-12 academic year. In addition, Enterprise Risk Management is integrated into the planning process.



Enterprise Risk Management:

As a result of a broadly inclusive risk re-assessment exercise in 2010, a set of enterprise risks were identified to be proactively monitored and integrated into annual goals. The primary enterprise risks are addressed by strategic initiatives and resources in *Plan 2020* (particularly Enrollment, Academic Distinction, Financial Health and Marketing) in order to enable Saint Joseph's to achieve its strategic goals. Additional risks are the focus of the risk owners and actively mitigated through annual goals.

Financial Plan FY12-FY15

A rolling three-year Financial Plan was developed during FY10 (for the period FY11-13) to support the Bridge Plan assumptions and to anticipate the resource needs during the initial implementation of *Plan 2020*. The plan assumptions are revisited annually, actual results analyzed, and the Financial Plan is revised and extended by one year. The current plan assumptions for FY13 through FY15 are summarized below.

Financial Plan Assumptions:

I. Enrollment Projections:

Plan 2020 was developed within the framework of modest growth projections, increased selectivity, improved retention and graduation rates, and solidified market position.

- Undergraduate Day :
 - Freshmen** +25 freshmen per year to a total of 1350 in FY15
 - Transfers** +80 to 100 new transfers per year
 - Total** 4521 in FY13 to 4756 in FY15
 - Retention** gradually increase and maintain a freshman-sophomore retention rate of 90%
 - Graduation** Improve the four, five, and six-year graduation rates

- College of Professional & Liberal Studies: credit hour increases of 5% annually are projected FY13 through FY15

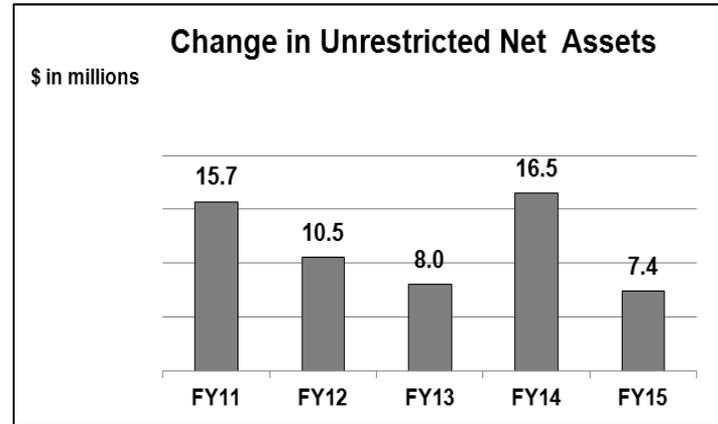
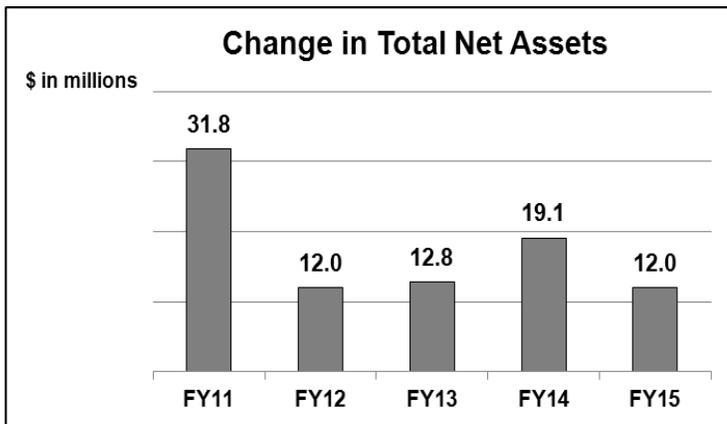
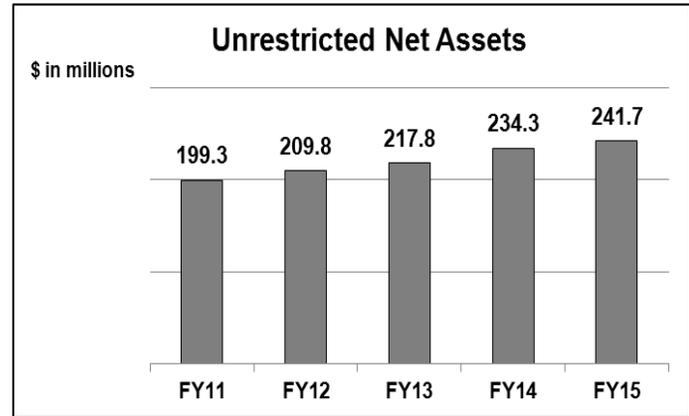
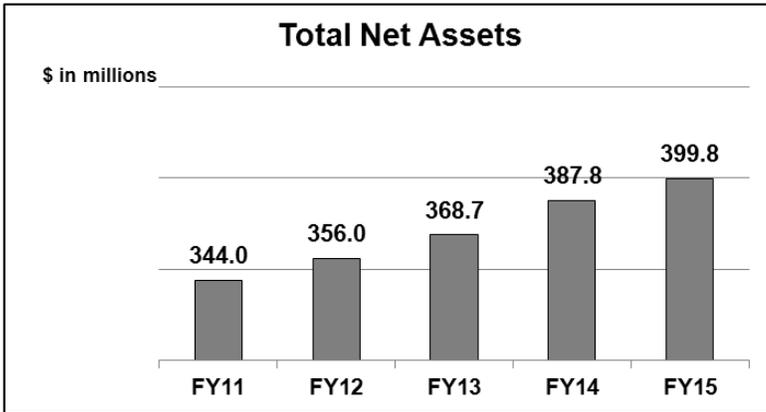
- Graduate Programs credit hours are projected to remain relatively flat in FY13 through FY15

II. Tuition Pricing Policy and Assumptions:

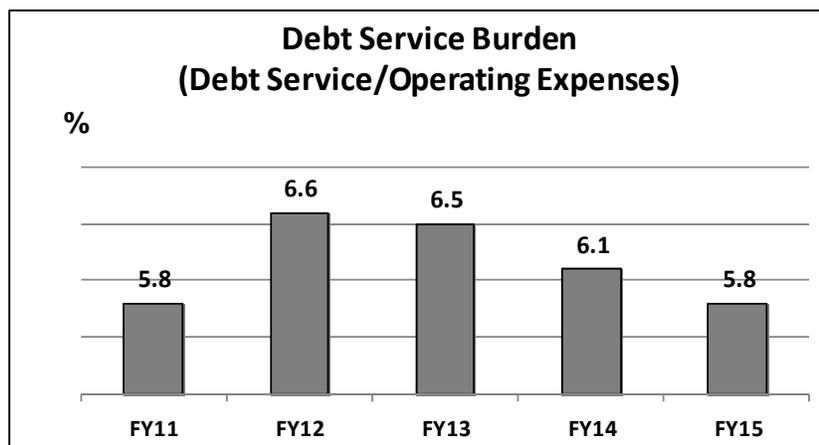
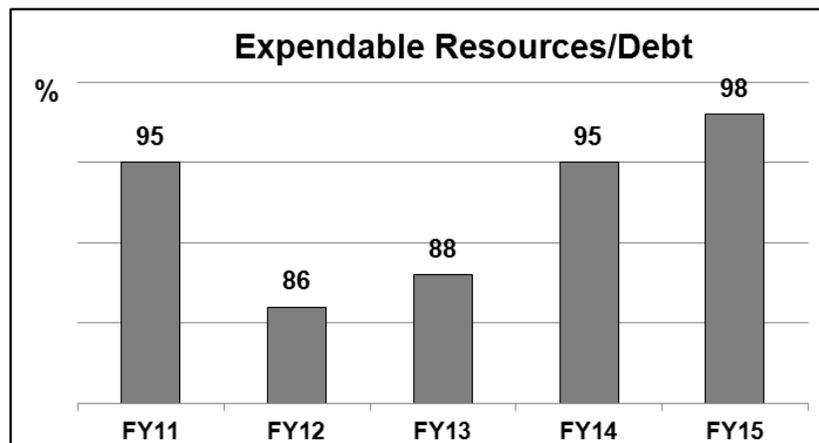
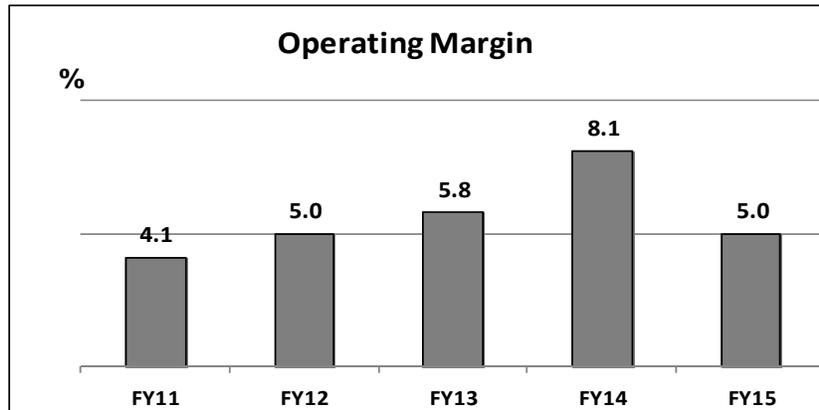
Modest increases in tuition, room and board fees with increased financial aid for new students are incorporated in the Financial Plan. The goal is to provide assistance to those for whom Saint Joseph's is a good fit to enable them to attend. For FY13, the following assumptions are incorporated into the Financial Plan:

Tuition increase	3.5%
Financial Aid discount not to exceed	38.5%
Housing increase	2.0%
Board rate increase	3.0%
Salary and structural pool	2.5%
Health Insurance increase	8.0%
Endowment Spend rate	4.0%
Inflation	2.0%

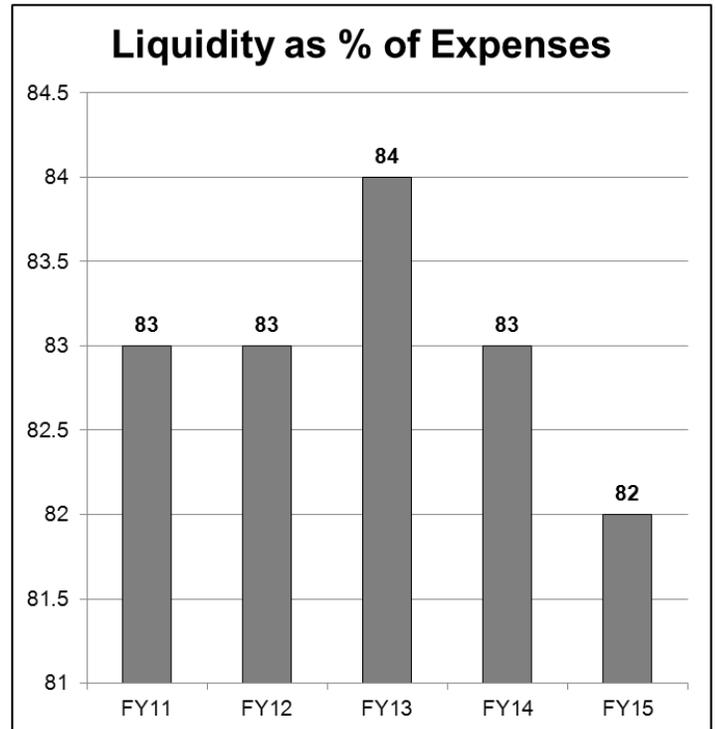
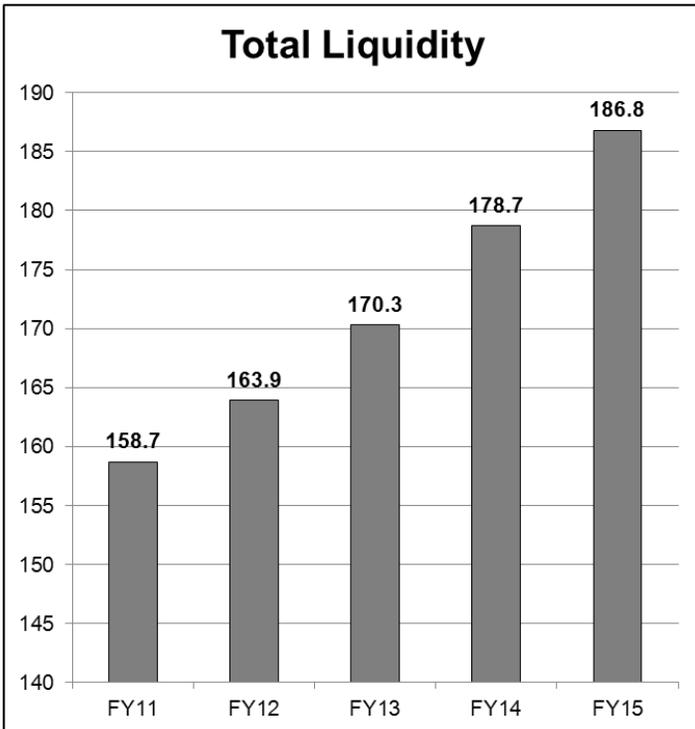
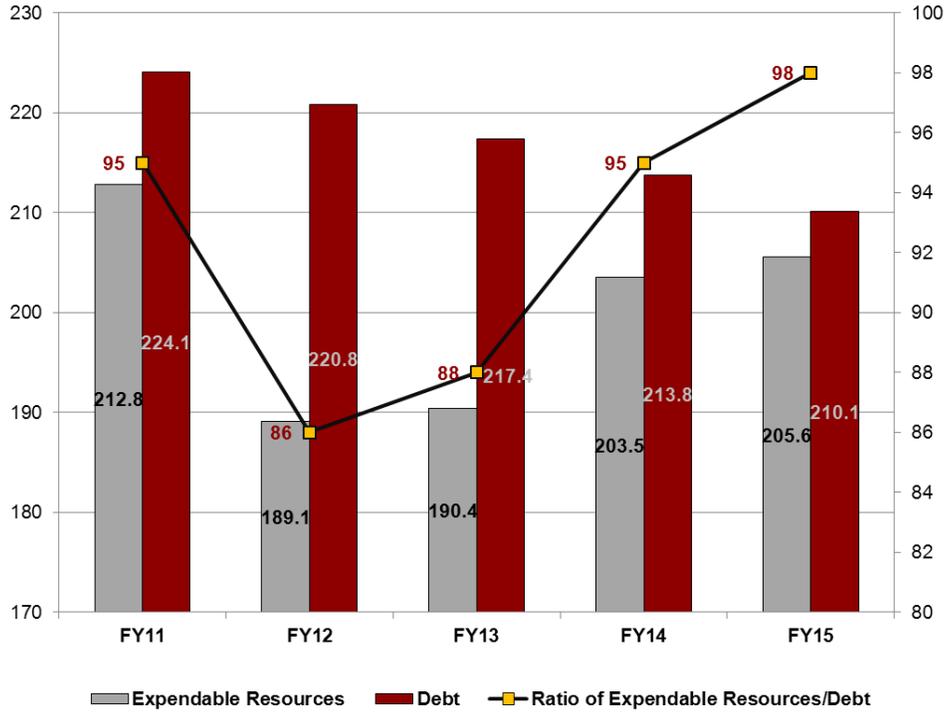
III. Asset Growth, Operating Margin and Financial Ratios FY13-FY15



Financial Ratios FY13 – FY15



Expendable Resources and Debt (Millions)



Academic Plan 2011- 2014

Seeking the Magis

I. Introduction

Inspired by the Jesuit aspiration to find God in all things, especially in the development of our students as whole human beings, Saint Joseph's University will build on the tradition of the liberal arts through implementation of the new General Education Program, strengthen competitive programs in each division, expand its curricular offerings characterized by interdisciplinary inquiry, and deepen its commitment to ethics, service and diversity in the curriculum. The growth and development of the full-time faculty will be commensurate with programmatic goals as well as modest growth in the undergraduate student body.

If Saint Joseph's is to join the ranks of the most competitive universities in the country, academic distinction must be a strategic priority, to be pursued with discipline and creativity for at least the next decade. Incorporated into this Academic Plan are goals that will enable Saint Joseph's to fulfill the *Plan 2020* Academic Distinction initiative, deliver an excellent and distinctively Jesuit education leading to improved reputation among all constituencies.

II. Strategic Priorities and goals:

1. **Academic Excellence.** A Saint Joseph's undergraduate education includes a rich and integrated core curriculum which is complemented by in-depth study in majors and minors, experiential learning and through institutes and cooperative programs. At the graduate level Saint Joseph's offers values-based, academically challenging professional degrees. *To enhance academic excellence Saint Joseph's will:*

1. **Strengthen Academic Programs of Excellence** that will ensure our competitive strength in five areas (Business, Education, Humanities, Math/Natural Sciences, and Social Sciences).

i. **Strengthening Existing Programs of Excellence:**

<i>Business</i>	<i>Accounting and Finance: BS/MS</i>
<i>Humanities</i>	<i>English/Writing Studies: BA/MA</i>
<i>Sciences & Math</i>	<i>Biology: BS/MS/Pre-Med</i>
<i>Social Sciences</i>	<i>Psychology: BS/MS</i>
<i>Education</i>	<i>Special Education: BS/MS</i>

ii. **Identify Future Programs of Excellence** that will build on and continue to grow Saint Joseph's reputation for excellence. Develop plans to further transform recognized programs of strength into future programs of excellence.

2. **Strengthen Key Institutes and Centers of Excellence** to expand Saint Joseph's reach outside the University and enhance its reputation. Priority Institutes and Centers for FY12-14 include the *Kinney Center for Autism Education and Support*, the *Academy of Risk Management and Insurance* and the *Faith-Justice Institute*.
3. **Fully implement the General Education Program:** The foundation of undergraduate education is the General Education Program. Providing an excellent experience, particularly in the Signature Core, is essential to the academic identity and integrity of SJU.

2. **Transformative Teaching & Scholarship:** At Saint Joseph's teaching is centered on the individual student (*cura personalis*) and emphasizes challenge, excellence for the greater good (*magis*), and moral discernment.

1. Among the initial goals for **Teaching and Scholarship** are:
 - i. Expand and grow the Summer Scholars Program to 125 by 2015
 - ii. Expand the number of students in Service-Learning from 550 to 800 per year
 - iii. Offer two faculty development workshops every summer, alternating between Ethics Across the Curriculum, Ignatian Pedagogy, Teaching Writing Intensive Courses
 - iv. Establish a Center for Teaching Excellence that incorporates pedagogical excellence with effective use of emerging technologies to enhance learning.
 - v. Maintain discipline-appropriate class sizes
 - vi. Continue to evolve robust learning outcomes assessments and utilize results for further change

2. **Implement the First Year Experience program** with the goal of creating a first year centered university which celebrates the first year of our students aimed at "the fullest development of the individual student's potential both inside and outside of the classroom." The FYE will lay the foundation for our students' future success at the university by instilling in each a passion for learning, a respect for open and free inquiry, a desire to pursue the life of the mind, and a commitment to social justice.

3. **Enhance the Honors Program**

4. **Achieve and maintain national, state, and professional accreditation to ensure adherence to high disciplinary and professional norms.**

5. **Continue and expand the Faculty Hiring Plan** to add approximately 8 to 10 new full-time and tenure-track faculty positions annually in FY13-15 to support undergraduate and graduate student enrollment, new GEP needs, academic programs of excellence, and new interdisciplinary fields of study. Promote a priority for attracting qualified Jesuits to serve in tenure-track faculty roles.

6. Improve Admissions selectivity, yield rates and retention (See *Plan 2020*, p. 8)

7. Continually focus on student outcomes goals in chosen careers, acceptance to graduate school, volunteer work, and through successful post-baccalaureate fellowships

8. Continue building assessment culture to make curricular enhancements

3. Transformative Student Experience

Committed to our Catholic Jesuit tradition and guided by our Ignatian values, we empower our students to create a supportive and transformative educational experience. Specifically, the transformative student experience will focus on:

- Enhancing faith development and spiritual awareness for all students
- Instilling an ethos of appreciation of diversity and preparation for a global society
- Assisting students in realizing a satisfying and productive life
- Providing opportunities for servant leadership focused on social justice
- Developing programs to allow for discernment of personal, educational and professional goals

4. Curricular Innovation: New Fields/Interdisciplinary Programs/New Schools

1. Introduce new fields of study that are in concert with the mission and meet the market needs of students, industries, non-profits.

2. Enhance and Expand Interdisciplinary Programs that provide students with a more integrated learning experience and SJU with a stronger market advantage.

3. New Schools: As Saint Joseph's has grown and many new majors and programs have been added, the college structure within the University has remained static. Over the next three years there will be a feasibility study for a School of Education, with the potential to include human services fields.

5. Leading from Mission: Ethics, Service and Diversity

1. Ethics: The concept of educating leaders with a conscience leads Saint Joseph's to renewed campus-wide focus. The initial goals in this effort include providing faculty support to the GEP and other ethics-intensive initiatives by hiring three additional ethicists; infusing Jesuit vision and ethics into the Honors Program; and creating a Strategic Asset plan for the Pedro Arrupe Center to expand its external reach.

2. Service: Service is a significant part of the identity of Saint Joseph's, and the University has been recognized nationally as a community-engaged institution. In order to provide additional undergraduates that opportunity, Saint Joseph's will expand the

Service-Learning Program from 550 to 800 student participants per year; and create a viable, long-term plan for the Alliance for Catholic Education.

3. Diversity: Expand the emphasis on education for diversity. Educating students for a more diverse world is both a moral imperative and an enriching educational opportunity. To further embrace this vision, Saint Joseph's will continually expand the qualified pools so that by 2020 the presence of faculty of color will be significantly increased; continue to hire faculty who can increase the emphasis in the curriculum on multicultural issues; and expand the Ignatian College Connection from 100 students to 150 students by 2015.

6. Scholarships and Endowment. The next Campaign will include goals for scholarships and endowment in the areas of Student Scholarships; Endowments for Centers and Institutes; Provost's Fund for Academic Excellence; Deans' Funds for Educational Innovation; and Mission

III. Resources

Each of the initiatives in the Academic Plan, along with the related faculty hiring and college level goals, will be analyzed for resource needs. The funding allocations currently in place for FY12 will be augmented annually in order for Saint Joseph's to continue to pursue heightened levels of academic excellence. An initial three-year budget for the Academic Plan is being prepared and will include funding requests for FY13 - FY15 budgets.

Faculty Hiring Plan: Achieving the goals in the Faculty Hiring Plan will require an additional \$1M annually in FY13-FY15.

Academic Infrastructure

A strong academic infrastructure, including robust student services tailored to meet evolving student needs, will be developed in order to implement the ambitious goals and make significant progress in the continual evolution of academic distinction and a transformative student experience. Over the next five fiscal years the commitment will include funding of:

Faculty Hiring Plan	General Education Program implementation
Faculty Development	Programs of excellence, institutes and schools
First Year Experience	Scholarships
Endowment for programs and chairs	Student research funding
Academic Advising	Mission-based programs
Retention and student success	IT infrastructure, support, computer replacements
Services for learning/physical disabilities	Integration of student services
Tutoring and Supplemental Instruction	Support Online Programs through DLC and ITDL



Athletics

Strategic Plan 2011-2014

The Athletics mission statement calls for education of the whole person, complementing the Saint Joseph's academic experience with varsity athletic and recreational programs and activities that provide opportunities for students to learn self-discipline, responsibility, decision-making and attainment of goals. It is the goal of the Athletics department to create an environment for personal growth through openness, respect, concern for others and an understanding of the value of community and family through teamwork and sportsmanship. Athletics at Saint Joseph's will advance the University regionally and nationally through winning intercollegiate athletics teams. In order to fulfill the mission statement, over the next three years the division will focus on the following.

- 1. Academic Excellence:** Enhance the intellectual, moral and leadership growth and development of each student-athlete.
- 2. Athletic Excellence and Enhanced Competitiveness:** Create an environment that attracts strong student-athletes and provides them with the facilities and support to compete and win on a regular basis. Achieve national excellence in selected varsity team sports within a broader program of regionally competitive individual and team sports that exhibit the highest standards of integrity.
- 3. Enhance revenues and remain excellent stewards:** Leverage athletics facilities to generate revenues that will contribute to the support of athletics programs. Manage internal resources in a manner that ensure University and donor confidence.
- 4. Build Athletics into a Strategic Asset** to heighten overall University visibility and reputation for excellence. Create school spirit, pride and visibility that increase overall enrollment, fundraising, as well as the athletic success of the University.
- 5. Student-Athlete Growth and Development:** Focus on the benefits of varsity athletics, specifically the opportunities for moral and leadership growth and development of each student-athlete.

Development and Alumni Relations

Strategic Plan 2011- 2013

Having successfully completed the final year of the campaign, *With Faith and Strength to Dare: The Campaign for Saint Joseph's University*, which raised a cumulative total of \$152.1M, the Office of Development and Alumni Relations continues to make progress in creating a culture of philanthropy among our constituencies while advancing the mission of Saint Joseph's. As we begin the next chapter of fundraising, we continue to work to fulfill funding for the remaining initiatives from the campaign – the James J. Maguire '58 Campus, the Michael J. Hagan '85 Arena, and the John and Maryanne Hennings Post Learning Commons – while laying the groundwork for the next campaign which will focus on Academic Distinction. Reaching our annual goal of \$5M in support of the Saint Joseph's Fund and increasing the alumni participation rate will also continue to be fundraising priorities. Plan goals include:

1. **Build on the success of "With Faith and Strength to Dare"** by stewarding donors through recognition, acknowledgement and gratitude. Continue to convey the transformative and measurable impact of the Campaign on the life of the campus, students and faculty. Implement robust alumni programming to strengthen engagement with all alumni and enhance the culture of philanthropy.
2. **Initiate Pre-campaign planning** phase focused on Academic Excellence; expand the staff and office facilities to support increased campaign goal; and engage key prospective donors for campaign priorities while expanding the prospect pipeline.
3. **Begin campaign planning phase** with new President, integrating his vision of with identified academic priorities.
4. **Refine funding priorities for the next campaign** focused on achieving the goals of Academic distinction as stated in the **Academic Plan**. This will include scholarships and faculty support as well as support for the college goals: SJU ACE program, Catholic Bioethics Institute, Catholic-Jewish Institute, Faith-Justice Institute, Honors Program, expansion of Haub School facilities and endowment; Academy of Risk Management and Insurance and Pedro Arupe Center for Business Ethics. In addition, goals will include completing major capital projects (Hagan Arena, Post Learning Commons); building the endowment for the Kinney Center for Autism Education and Support; while maintaining a strong Annual Fund and increasing members of the *Magis* Society.
5. **Fundraising priorities for FY12** include Scholarships and faculty support for Academic Distinction, Campus Commons/Admissions Welcome Center, Athletic Fields, Hagan Arena, and Post Learning Commons. Fundraising goals: \$13M in new commitments through the Saint Joseph's Fund and Major/Leadership gift fundraising, with an 18% Alumni participation rate.

Enrollment Management Undergraduate Admissions Plan 2011-2014

1. Continually stress the value of a private Catholic, Jesuit, Saint Joseph's education and articulate specific academic strengths **through the integrated Image/Marketing Campaign** being coordinated through University Marketing & Communications. Develop succinct and compelling messages to best position Saint Joseph's within the competitive and noisy higher education landscape.
2. **Enhance Recruitment and Selectivity:** Increase prospective student interest each year. Increase applications by 3%-9% each year with a goal of attaining 10,000 applications by 2016 through refined search efforts and targeted travel to our primary and secondary market and through articulation agreements with Community Colleges. Decrease admit rate to 70% by fall of 2014.

	Fall 2011 Projections	Fall 2012	Fall 2013	Fall 2014
Freshman Application Increase	6%	6%-8%	6%-8%	5%-7%
# Applications	7402	7845 - 7993	8310 – 8626	8861- 9294
Admit Rate	78%	75%-79%	71%-74%	66%-70%
Yield Rate	20%	20.4%	20.4%	20.4%
Freshman Enrollment Goal	1137	1202	1225	1250
Transfers	67	80	80	100

3. **Enhance the Visit Experience:** Utilize the new Welcome Center in the Campus Commons to assure that families have an informed and welcoming visit, and reinforce the image and value of a private, Catholic, Jesuit Saint Joseph's education.
4. **Improve Communications with prospective students and parents** through an enhanced web experience and streamlined automated communication delivery system.
5. **Improve Diversity of the Undergraduate Student Body** by continuing to work to increase the proportion of students of color in the freshman class.
6. **Refine operational processes and provide better customer service through effective use of technology and human resources** by implementing the SJU online application; a mobile inquiry card strategy (Fall 2011); automated test score uploads (Fall 2011); and a student portal for student access to admissions status (Fall 2013 - Spring 2014)

Information Technology Strategic Plan 2012-2015

Introduction

The Office of Information Technology (IT) designs and supports the core technology resources and services for Saint Joseph's University. This includes the voice, data and video networks, instructional technology, enterprise information systems, web resources, and technology support services. We strive to be a customer-focused advocate of technologies which facilitate and enrich the learning, teaching and research experiences of Saint Joseph's students and faculty and empower our administrators and staff to provide exceptional support to their clients.

The University's strategic plan, *Plan 2020: Gateway to the Future* provides a broad framework for the IT Strategic Plan for 2012-15. The next five years will undoubtedly provide challenges and opportunities resulting from significant technological changes. Evaluating the tools, identifying the trends, providing support and making critical changes that impact the student experience will be the focus for Information Technology. Saint Joseph's image and reputation will be enhanced by technological deployments that support excellent teaching and transformative learning goals.

IT Plan Strategic Themes

I. Deliver technology-based solutions which support the University's Strategic Initiatives

Information Technology is fully dedicated to utilizing technology to advance the teaching, learning and research mission of Saint Joseph's University. IT will partner with the Offices of Enrollment Management, Marketing Communications and Development and Alumni Relations, to develop the University Web presence as a strategic engagement, marketing and recruiting tool. Promote an education-technology partnership with Academic Affairs and student leadership to advance faculty teaching, scholarship and student education. IT will proactively research evolving technology, and its impact on teaching and learning, and on undergraduate education.

II. Optimize technology resources for greater institutional effectiveness

Information Technology will collaborate with faculty, students and staff to select appropriate technology to effectively address educational needs. Information Technology will provide leadership in business process innovation and effective stewardship of university technology resources to reduce costs and improve productivity.

III. Engage the community for better alignment with the mission of the University

Information Technology seeks to fully engage all constituents to better understand their needs and goals and to demonstrate how technology may assist them in achieving their goals. Information Technology builds relationships with all constituents of the University and uses those relationships to deliver better services.

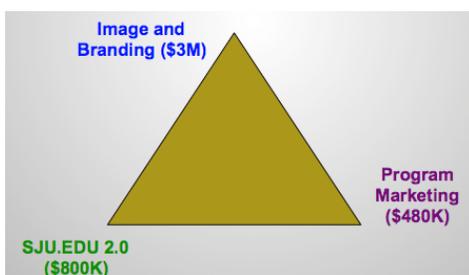
IV. Sustain the technology infrastructure to foster ubiquitous access.

Information Technology strives to ensure that everyone has timely, ubiquitous and secure access to the information resources needed to achieve their teaching, learning and administrative objectives.

Integrated Marketing Plan 2011-2015

The recent addition of comprehensive market research conducted in support of *Plan 2020: Gateway to the Future*, compels Saint Joseph's to develop an Integrated Marketing Plan to complement substantial strategic investments in the areas of Academic Distinction, Enrollment Management, Information Technology, Intercollegiate Athletics, Mission, and Development/Alumni Relations.

The three-year Integrated Marketing Plan being developed based upon Saint Joseph's newly funded marketing communications "triangle," each point of which has been deemed critical to SJU's success and growth. Communicating a clear position and value proposition will positively impact enrollment, fund raising and the academic reputation of the institution.



Goals:

1. **MARKETING PLAN:** Create an integrated marketing plan to increase visibility and ensure that Saint Joseph's is known for academic rigor and successful career outcomes, resulting in a refined position in the marketplace with a clear value proposition.
2. **IMAGE AND BRANDING:** Invest substantially in communicating the SJU value proposition to multiple constituencies in a systematic way and regularly evaluate the impact on the broader image of Saint Joseph's. Evaluate the results and reprioritize investments, providing a permanent image budget base upon which to expand.
3. **WEBSITE PRESENCE/SJU.EDU (2.0):** Deploy a dynamic core site, rich-media "success stories," and enhanced tracking and analytics to attract and retain future generations of students. Over the next three years, Saint Joseph's will invest up to \$800K to complete an SJU.EDU 2.0 web overhaul. Commensurate staffing to maintain and grow the proposed site will be needed toward the back end of an evolving multi-year web plan.
4. **PROGRAM MARKETING:** Aggressive enrollment targets in the "Bridge Plan" for Graduate Business, Graduate Arts & Sciences and the College of Professional & Liberal Studies point to the ongoing shortfall in call-to-action advertising dollars targeting part-time and adult students. In response, investments are being made over a three-year period to bring SJU to the midpoint of its competitive set in peer media spending. Equally important to this effort is the implementation of SRM and internal return on investment metrics to inform both tactics and decision-making in identifying high-growth, high-revenue programs where ongoing or incremental ad dollars can have the most impact on enrollment revenue.

Office of Mission Strategic Plan 2011-2014

Mission Plan Goals:

1. Facilitate a clear understanding of Saint Joseph's University's Catholic and Jesuit identity and mission among all constituencies. Create an ongoing, vibrant program of mission education and formation geared to each constituency, and incentives for hiring for mission and diversity. This will include a discussion of the *Declaration of Shared Purpose of the Society of Jesus*, as well as the SJU Mission in Action report and other current documents.
2. Ensure that institutional analysis, prioritization and decision-making are intentionally grounded in and guided by our mission.
3. Develop an explicit mission communication plan that ensures that our Catholic and Jesuit identity and mission are established, understood, and implemented consistently inside and outside the University, and align with *Plan 2020*.
4. Continue to grow the Office of Institutional Diversity's Ignatian College Connection Program. Provide support for the Diversity Plan implementation (see goals below).
5. Enhance immersion programs, and promote faith and mission formation for students through the Office of Campus Ministry.
6. Use the recognition as a Carnegie Engaged Institution to strengthen our mission-based outreach to, and interaction with, local, regional, national and international communities and institutions.

Diversity Plan Goals:

I: Diversity Readiness/Campus Climate and Intergroup Relations. Establish programs that more fully develop the core values of community as well as to create an infrastructure that values cultural differences. Assure that policies, procedures, and programs support and encourage an inclusive and respectful environment for faculty, staff and students.

II: Recruitment and Retention. Focus on renewed efforts to expand campus diversity by recruiting and retaining multi-cultural members of the SJU community (trustees, faculty, staff and students.)

III: Enhance education and scholarship. Provide interdisciplinary educational experiences to prepare students to become global citizens. Enhance course offerings to address diversity issues in the classroom and curriculum.

IV: Internal and external collaborations. Develop partnerships and collaborative opportunities that are designed to build capacity throughout the university and in the broader community affiliated with and served by the university.

Campus Master Plan

Goals:

1 - Support *Plan 2020*

Identify means in which existing and future campus facilities can support the initiatives being developed for the SJU strategic plan.

2 - Utilization Evaluation

Develop information regarding classroom and administrative utilization to inform planning for campus enrollment growth goals.

3 - Flexibility Planning

Plan for infrastructure and buildings that allow flexibility to accommodate new and changing academic programs, and encourages the integration of co-curricular activities with student life.

4 - Open Space Development

Develop a long term plan for outdoor facilities such as open space, walkways, parking, campus edges and gateways, to enhance student life, campus identification, community engagement, and sustainability.

5 - Acquisition Analysis

Evaluate potential property acquisition to inform growth options that will be considered over the next ten years.

6 - Implementation Proposal

Propose a plan for phasing implementation to facilitate financial investment, departmental moves, student body growth, building repairs, and campus improvements.