

Distinguished Members of the Board of Trustees,

I am both honored and excited to present you with our 2026 Strategies & Initiatives Report on behalf of the President's Cabinet and the Strategic Planning Committee (SPC). After receiving Board approval in November to implement a new Strategic Planning Process, the SPC has worked diligently to gather voice of community and evaluate external factors and trends as the basis for this report, which is a major deliverable for Strategy Development Phase 2.

The Strategies & Initiatives Report is built upon Saint Martin's Strategic Foundation (Section 2), which is presented with no changes. With our Strategic Foundation as a guide, we defined institution-level Strategies & Initiatives (Section 3) that will take us forward in pursuit of our mission – representing the areas of focus that the Cabinet and SPC consider to be critical to the University's future.

A preliminary draft of this report was provided to the Board on Jan. 30, 2023. Since then, we have refined the Measures of Success and added preliminary FY26 Goals. Today's meeting is important because the Strategies & Initiatives Report requires Board approval, which we hope to receive at the conclusion of our meeting. Following approval, we will prepare and select the Annual Improvement Projects (AIPs) and finalize budgets and metrics for FY24 – allowing us to deploy our 2026 Strategic Plan on July 1, 2023.

During the past few weeks, the SPC and I have appreciated the opportunity to meet with members of the Board to gather feedback, answer questions, and hear suggestions regarding the proposed Strategies & Initiatives. We are sincerely grateful for the time, trust and support you have given us.

With heart, President JBR

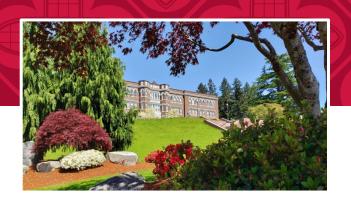
# 2026 Strategies & Initiatives Report

Prepared for the Board of Trustees

Presented by President JBR on behalf of the President's Cabinet and Strategic Planning Committee

Feb. 23, 2023





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Section 1: Strategic Planning Progress Update

Section 2: Strategic Foundation

Section 3: Strategies, Initiatives & Measures of Success

Section 4: Appendix



## SECTION 1: STRATEGIC PLANNING PROGRESS UPDATE

- Strategic Planning Process
- Phase 2 Work Completed



## 3 PHASES OF STRATEGIC PLANNING<sup>1</sup>



#### STRATEGY ASSESSMENT

#### STRATEGY DEVELOPMENT

#### STRATEGY DEPLOYMENT

- Annual Review of Strategic Plan Performance
- 2. Institutional Self Assessment
- 3. Industry/Environment Analysis

- 4. Institutional Visioning & Strategic Priorities
- 5. Strategy Statements & Objectives
- 6. Annual Improvem Projects (AIPs) (1 year)
- 7. Annual SP Budget
- Align & Approve AIPs w/
  Budget & Leaders

- Deploy Annual Improvement Projects (AIPs)
- 10. Quarterly Reviews of Strategic Plan Performance at Board Meetings

**WE ARE HERE** 

<sup>&</sup>lt;sup>1</sup> Adapted from the Lean Hoshin Kanri Strategic Planning process.

## Saint Martin's UNIVERSITY

## STRATEGY DEVELOPMENT

| Strategy Development Step                         | Responsible   | Outputs  |              |
|---|---|--|--------------|
| 4. Institutional Visioning & Strategic Priorities | Board of Trustees & President                                 | Vision, Mission, Values Statements,<br>Strategic Priorities      | FEB          |
| 5. Strategy Statements & Objectives               | President & SP<br>Committee Present to<br>Board of Trustees   | Strategy Statements & Objectives,<br>Metrics, High-level Roadmap | BOARD<br>MTG |
| 6. Annual Improvement Projects (AIPs)             | President's Cabinet AIP Leaders                               | AIP Charters, AIP Plan   | ٦            |
| 7. Annual SP Budget                               | President's Cabinet<br>Led by CFO, Approved by<br>Board       | Annual SP Budget   | MAY<br>BOARD |
| 8. Align & Approve AIPs w/<br>Budget              | President's Cabinet<br>Led by President,<br>Approved by Board | Approved Annual SP Budget Approved AIPs w/ Budget & Leaders      | MTG          |

#### PHASE 2

## IN PROGRESS



#### COMPLETE: STRATEGY WORKSHOP PRE-WORK

- The SPC provided current state, future state, measures of success, and initiative and program ideas for each item in the SWOT analysis
- All constituent groups were asked for input

#### **COMPLETE: STRATEGY WORKSHOP ACTIVITIES**

- During two workshops, the SPC discussed, evaluated, categorized and prioritized more than 80 proposed initiatives, programs and projects
  - Institution-level strategies
  - Division/department-level strategies
  - Ready for action
  - For consideration

#### **COMPLETE: MEASURES OF SUCCESS, FY26 GOALS**

- The SPC and Cabinet worked to finalized the Measures of Success and preliminary FY26 Goals.
- FY26 Goals may be refined before the May Board meeting based on FY24 AIPs and resources, and/or new data or benchmarks

#### ON DECK: CAMPUS COMMUNICATIONS PLAN

- Strategic Plan Townhall & Recording Mar. 1
- Call for AIP Proposals Mar. 1 Mar. 31
- AIP Proposal Info Sessions & Recording Mar. 3, Mar. 16
- AIP Proposal Review & Selection Apr. 3 Apr. 17

## SECTION 2: STRATEGIC FOUNDATION

- Founding Traditions
- Vision
- Mission
- Institution Themes
- Benedictine Charisms
- Framework for Strategic Priorities





#### **FOUNDING TRADITIONS**

Saint Martin's University is a Catholic, Benedictine, Liberal Arts institution.

#### **VISION**

We strive for holistic development, collaborative exchange and an integrated approach to teaching and learning as an exemplary Catholic, Benedictine University.





#### **MISSION**

Saint Martin's University is a Catholic, Benedictine institution of higher education that empowers students to pursue a lifetime of learning and accomplishment in all arenas of human endeavor.

Saint Martin's students learn to make a positive difference in their lives and in the lives of others through the interaction of faith, reason, and service. The University honors both the sacredness of the individual and the significance of community in the ongoing journey of becoming.



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#### **INSTITUTION THEMES**

- Faith
- Reason
- Service
- Community





#### **BENEDICTINE CHARISMS**

The charisms that guide Saint Martin's University are based on the Benedictine tradition and include:

- Awareness of God
- Community Living
- Dignity of Work
- Hospitality
- Justice
- Listening

- Moderation
- Peace
- Respect for Persons
- Stability
- Stewardship







## FRAMEWORK FOR STRATEGIC PRIORITES

- People
- Purpose
- Place
- Performance

## SECTION 3: STRATEGIES, INITIATIVES & MEASURES OF SUCCESS

- Strategic focus
- Six institution-level strategies
- Note, the numbering of strategies and initiatives in this section does not signify importance, ranking, and/or sequence—numbering is purely for reference



2/23/23 2026 Strategic Plan



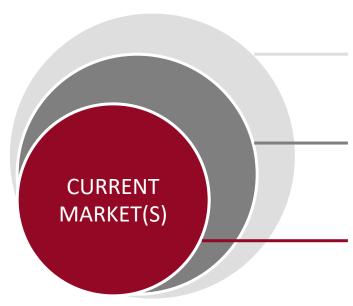


#### An institution-level strategy requires:

- Strategic, long-term impact
- Multiple divisions/departments to accomplish
- Major investment (people, time, funding)

## STRATEGIC FOCUS: GROWTH IN CURRENT MARKETS





#### **NEW OR EMERGING MARKETS**

Target investment and growth in new or emerging markets – shaping these markets as an early entrant to leverage your institution's strengths (\$\$\$\$)

#### **ADJACENT MARKETS**

Target investment and growth in adjacent markets that are closely aligned to your current market and institution's strengths (\$\$)

#### **CURRENT MARKET(S)**

Target investment and growth in current markets by developing your institution's strengths, differentiators and operational maturity to increase market share and financial position (\$)

#### INSTITUTIONAL STRATEGY #1

### **PEOPLE**



#### 1. INVESTING IN OUR PEOPLE

**Strategy Statement 1.0:** Saint Martin's University will exemplify its Catholic, Benedictine, Liberal Arts founding traditions by investing in the people who dedicate themselves to the University's mission and vision.

**Initiative 1.1:** Optimizing our institutional structure and operating systems/practices to support our people

**Initiative 1.2:** Ensuring equitable and competitive "total compensation" (salaries/wages, benefits, paid leave, etc.) for staff and faculty

**Initiative 1.3:** Creating a mission-based culture that is backed by robust performance management systems (goal setting, performance reviews, merit-based rewards, policies and practices, accountability, etc.)

#### MEASURES OF SUCCESS

## STRATEGY #1



| Strategy   | Measures of Success   | Data Source<br>Benchmark  | FY22<br>Result     | FY23<br>Target   | FY26<br>Goal       |
|--|---|---|--------------------|------------------|--------------------|
| 1. INVESTING IN OUR  | % full-time faculty retention<br>% full-time staff retention                              | ADP HR System CUPA-HR   | FTF 93%<br>FTS 82% | FTF NA<br>FTS NA | FTF 95%<br>FTS 85% |
| PEOPLE Saint Martin's University will exemplify its Catholic, Benedictine, Liberal Arts founding traditions by | % full-time faculty at/above salary benchmark % adjunct faculty at/above salary benchmark | ADP HR System  CUPA-HR & IPEDS  | FTF 25%<br>AF NA   | FTF NA<br>AF NA  | FTF100%<br>AF 100% |
| investing in the people who dedicate themselves to the University's mission and                                | % full-time staff at/above salary benchmark   | ADP HR System CUPA-HR   | FTS 64%            | FTS 100%         | FTS 100%           |
| vision.  | % campus climate survey scores in salary/benefits section                                 | HERI Survey <sup>1</sup> All Institutions (45%) <sup>2</sup> CUPA-HR (39%) <sup>3</sup> | FTF NA<br>FTS NA   | FTF NA<br>FTS NA | FTF 30%<br>FTS 30% |

<sup>&</sup>lt;sup>1</sup> HERI survey is only conducted every 3 years, SMU will develop and administer an annual campus climate survey starting in FY24.

<sup>&</sup>lt;sup>2</sup> HERI climate survey result from 2017-18 indicate that 19% of SMU employees were "satisfied" or "very satisfied" v. 45% at "all institutions"; to be updated in April.

<sup>&</sup>lt;sup>3</sup> CUPA-HR 2022 Employee Retention Survey - 39% of respondents "agreed or strongly agreed" that they were "paid fairly".

## PEOPLE & PURPOSE



#### 2. LEVERAGING CORE CURRICULUM TO DISTINGUISH SMU

**Strategy Statement 2.0:** Saint Martin's University will build upon its Catholic, Benedictine, Liberal Arts founding traditions to create a more compelling value proposition for students in a manner that distinguishes the University.

**Initiative 2.1:** Leveraging our core curriculum to create a compelling value proposition for students and distinguish Saint Martin's University (v. competitors) in the industry

**Initiative 2.2:** Creating a four-year graduation guarantee

#### MEASURES OF SUCCESS

## STRATEGY #2



| Strategy  | Measures of Success                                 | Date Source<br>Benchmark                       | FY22<br>Result                 | FY23<br>Target               | FY26<br>Goal                   |
|---|---|--|--------------------------------|------------------------------|--------------------------------|
| 2. LEVERAGING CORE<br>CURRICULUM TO                                   | % admitted to enrolled conversion rate <sup>1</sup> | Slate EAB & MarketView (FYFT 13%)              | FYFT 14%<br>FYGA 5%<br>FTT 29% | FYFT NA<br>FYGA NA<br>FTT NA | FYFT 15%<br>FYGA 7%<br>FTT 35% |
| DISTINGUISH SMU Saint Martin's University                             | # increase in total enrollment <sup>2</sup>         | Student Info Sys<br>IPEDS Custom               | 1,601                          | NA                           | 1,750                          |
| will build upon its Catholic,<br>Benedictine, Liberal Arts            | % student one-year retention <sup>3</sup>           | Student Info Sys IPEDS Custom (FYFT 70%)       | FYFT 70%<br>FTT 81%            | FYFT NA<br>FTT NA            | FYFT 80%<br>FTT 85%            |
| founding traditions to create a more compelling value proposition for | % student experience scores <sup>4</sup>            | NSSE<br>Region (FY 83%, SY 88%)                | FY 75%<br>SY 77%               | NA<br>NA                     | FY 80%<br>SY 85%               |
| students in a manner that distinguishes the                           | % 4-year and 6-year graduation rates <sup>5</sup>   | Student Info Sys IPEDS Custom (4Y 61%, 6Y 69%) | 4Y 43%<br>6Y 61%               | NA<br>NA                     | 4Y 50%<br>6Y 68%               |
| University.   | % 6-mo post-graduation placement <sup>6</sup>       | Career Center Data<br>NACE (FW 64%, PNP 91%)   | 82%                            | NA                           | 85%                            |

<sup>&</sup>lt;sup>1</sup> First-year, full-time (FYFT); first-year, full-time, guaranteed admission (FYGA) is the inaugural year and should increase; full-time transfer (FTT)

<sup>&</sup>lt;sup>2</sup> Based on Fall semester 10-day counts.

<sup>&</sup>lt;sup>3</sup> Retention means a student returns after 1 year (i.e., a first-year student returns as a sophomore); FYFT Bachelor's seeking 1-year retention; IPEDS 70% benchmark is FY22 (Fall 2021 cohort)

<sup>&</sup>lt;sup>4</sup> Requires annual administration of the NSSE student survey; NSSE 2022 "good" or "excellent" for "overall experience" of first-year (FY), senior-year (SY) students.

<sup>&</sup>lt;sup>5</sup> Full-time, first-year, Bachelor's degree seeking 4-year or 6-year graduation rate; FY22 Results for 4-year grad rate based on Fall 2018 cohort.

<sup>&</sup>lt;sup>6</sup> Bachelor's earning alumni who are working, in grad school or military within 6 months of graduation; NACE benchmark data = Far West Region/Private, Non-Profit.

#### INSTITUTIONAL STRATEGY #3

## **PURPOSE**



#### 3. ENHANCING MISSION INTEGRATION

**Strategy Statement 3.0:** Saint Martin's University will embrace and demonstrate its Catholic, Benedictine traditions and charisms in all aspects of the University experience for students, staff, faculty, and guests.

**Initiative 3.1:** Creating a first-year experience for students, staff and faculty that increases our community's understanding and adoption of SMU's values

**Initiative 3.2:** Demonstrating love and respect for all persons through diversity, equity, inclusion and belonging/DEIB-centered teaching, hiring, programming, and culture

**Initiative 3.3:** Growing our connections with/support of Catholic organizations

#### MEASURES OF SUCCESS

## STRATEGY #3



| Strategy  | Measures of Success  | Data Source<br>Benchmark                        | FY22<br>Result     | FY23<br>Target | FY26<br>Goal       |
|---|--|---|--------------------|----------------|--------------------|
|   | % first-year seminar success - students                                      | Student Info Sys<br>No benchmark                | 86%                | NA             | 90%                |
| 3. ENHANCING MISSION INTEGRATION  | % first-year seminar success - new employees                                 | ADP HR / Everfi<br>No benchmark                 | NA                 | NA             | 80%                |
| Saint Martin's University will embrace and  | % campus climate survey score for "discrimination" <sup>1</sup>              | HERI Survey <sup>2</sup> All Institutions (19%) | 28% <sup>1</sup>   | NA             | 20%                |
| demonstrate its Catholic,<br>Benedictine traditions and<br>charisms in all aspects of | % of employees completing DEIB-informed hiring process training requirements | HR Info System<br>No benchmark                  | NA                 | NA             | 95%                |
| the University experience for students, staff, faculty, and guests.                   | % of employee population that is diverse <sup>3</sup>                        | HR Info System IPEDS Custom (FTF 15%, FTS 17%)  | FTF 12%<br>FTS 19% | NA<br>NA       | FTF 15%<br>FTS 22% |
|   | # of Catholic Connection programs  | Internal Spreadsheet No benchmark               | 20                 | NA             | 25                 |

<sup>&</sup>lt;sup>1</sup> Employee stress caused by "discrimination" defined as "prejudice, racism, sexism, homophobia, transphobia, etc."; HERI 2017-18; SMU 28% v. 19% "all institutions".

<sup>&</sup>lt;sup>2</sup> Because the HERI survey is only conducted every 3 years, SMU will develop and administer an annual campus climate survey starting in FY24.

<sup>&</sup>lt;sup>3</sup> Employees who identify themselves as racially and ethnically diverse (BiPOC).

#### INSTITUTIONAL STRATEGY #4

## **PLACE**



#### 4. MODERNIZING TECHNOLOGY AND IT SERVICE DELIVERY

**Strategy Statement 4.0:** Saint Martin's University will modernize its technology, systems, security, and service delivery model to enhance the productivity and achievements of students, staff, faculty, and guests.

**Initiative 4.1:** Establishing an institution-wide technology, systems, and security modernization budget and implementation plan

**Initiative 4.2:** Establishing a technology/IT service delivery model based on performance metrics, best practices and benchmarking

#### MEASURES OF SUCCESS

## STRATEGY #4



| Strategy   | Measures of Success                                       | Data Source<br>Benchmark   | FY22<br>Result   | FY23<br>Target | FY26<br>Goal |
|--|---|--|------------------|----------------|--------------|
|  | % current technology <sup>1</sup>                         | Internal Data<br>No benchmark                                      | NA               | NA             | 80%          |
| 4. MODERNIZING TECHNOLOGY & IT SERVICE DELIVERY Saint Martin's University  | % adherence to cybersecurity standards                    | Internal Data National Institute of Standards/Tech ( <u>NIST</u> ) | NA               | NA             | 90%          |
| will modernize its technology, systems,                                    | % IT network uptime                                       | Internal Data<br>No benchmark                                      | NA               | NA             | 99.5%        |
| security, and service delivery model to enhance                            | % classroom technology uptime                             | Internal Data<br>No benchmark                                      | NA               | NA             | 99.9%        |
| the productivity and achievements of students, staff, faculty, and guests. | % variance to technology budget                           | Dynamics GP<br>No benchmark  | -4% <sup>2</sup> | NA             | +/-2%        |
| starr, racticey, and guests.   | % standard service ticket to resolution time <sup>3</sup> | Internal Data<br>No benchmark                                      | NA               | NA             | 90%          |

<sup>&</sup>lt;sup>1</sup> Equipment, hardware, devices, systems, platforms, etc. that are not obsolete by industry standards and are supported by the manufacturer.

<sup>&</sup>lt;sup>2</sup> FY22 Results reflect the ITS department only because there is not currently a centralized technology approach or budget.

<sup>&</sup>lt;sup>2</sup> Standard "service ticket to resolution times" are TBD by level of complexity (i.e., level 1, level 2, level 3) for standard operating hours including evenings & weekends.

#### INSTITUTIONAL STRATEGY #5

## PERFORMANCE



#### 5. REDEFINING FINANCIAL PLANNING & MANAGEMENT

**Strategy Statement 5.0:** Saint Martin's University will establish new policies and practices for financial planning and management to improve institutional alignment and accountability while reducing financial risk.

**Initiative 5.1:** Delivering training and development programs to increase financial literacy (terminology, tools, process) across campus

**Initiative 5.2:** Establishing an annual budget planning and review process based on the principles of subsidiarity and accountability

**Initiative 5.3:** Implementing a return on investment (ROI)/business case analysis and "approval gate" for new programs, partnerships and/or investments

#### MEASURES OF SUCCESS

## STRATEGY #5



| Strategy   | Measures of Success  | Data Source<br>Benchmark     | FY22<br>Result | FY23<br>Target | FY26<br>Goal |
|--|--|------------------------------|----------------|----------------|--------------|
| 5. REDEFINING FINANCIAL PLANNING & MANAGEMENT  | % of full-time employees completing financial training requirements          | Training Roster No benchmark | NA             | NA             | 75%          |
| Saint Martin's University will establish new policies and practices for financial planning and management to improve institutional | % variance to established annual institutional budget                        | Dynamics GP<br>No benchmark  | -1.78%         | +/-2%          | +/-2%        |
| alignment and accountability while reducing financial risk.  | nment and ountability while  % compliance with approval Internal Spreadsheet |                              | NA             | NA             | 100%         |

## **PERFORMANCE**



#### 6. INCREASING FINANCIAL STABILITY

**Strategy Statement 6.0:** Saint Martin's University will target, evaluate, and pursue new revenue streams and funding sources to improve the University's financial stability.

**Initiative 6.1:** Leveraging our current assets to generate new, non-core revenue

**Initiative 6.2:** Pursuing government funding and grants

Initiative 6.3: Building the endowment to create a strategic plan fund and an operational contingency fund

#### MEASURES OF SUCCESS

## STRATEGY #6



| Strategy  | Measures of Success   | Data Source<br>Benchmark                            | FY22<br>Result                                 | FY23<br>Target | FY26<br>Goal       |
|---|---|---|--|----------------|--------------------|
|   | % of non-tuition revenue <sup>1</sup>                       | Dynamics GP IPEDS Custom                            | 40%  | NA             | 42%                |
| 6. INCREASING FINANCIAL STABILITY   | \$ value of gov't grants and contracts (new, total)         | Slate & Excel IPEDS Custom                          | N \$3.1M <sup>2</sup><br>T \$5.5M <sup>2</sup> | NA             | N \$1M<br>T \$9.5M |
| Saint Martin's University will target, evaluate, and pursue new revenue streams and funding | \$ value of endowment (invested)                            | US Bank<br>IPEDS Custom/CASE VSE<br>(\$185M median) | \$36M  | NA             | \$50M              |
| sources to improve the University's financial stability.                                    | Operational contingency fund - % of annual operating budget | Dynamics GP<br>No benchmark                         | NA   | NA             | 3% ³               |
|   | Strategic plan fund - % of annual operating budget          | Dynamics GP<br>No benchmark                         | NA   | NA             | 2% <sup>3</sup>    |

<sup>&</sup>lt;sup>1</sup> Includes all revenue sources except tuition; FY22 Results reflect unusual one-time events such as a \$5M donation and HEERF grant funding.

<sup>&</sup>lt;sup>2</sup> Includes HEERF grant funding.

<sup>&</sup>lt;sup>3</sup> FY26 Goals are cumulative amounts;, for example 1% in FY24; 1% in FY25; 1% in FY26.

## NOTIONAL STRATEGY ROADMAP



|                                   | INITIATIVE   | YEAR 1 (FY24)  | YEAR 2 (FY25) | YEAR 3 (FY26) |
|-----------------------------------|--|----------------|---------------|---------------|
|                                   | 1.1 Equitable and competitive total compensation                 | Implement      | Improve       | Sustain       |
| 1. INVESTING IN OUR PEOPLE        | 1.2 Optimizing our institutional structure and operating systems | Plan           | Implement     | Improve       |
|                                   | 1.3 Performance management systems and merit-based culture       |                | Plan          | Implement     |
| 2. LEVERAGING CORE                | 2.1 Core curriculum value prop / distinguish SMU                 | Plan           | Implement     | Improve       |
| CURRICULUM                        | 2.2 Four-year graduation guarantee                               |                | Plan          | Implement     |
|                                   | 3.1 First year experience for students, staff and faculty        | Plan           | Implement     | Improve       |
| 3. ENHANCING MISSION INTEGRATION  | 3.2 DEIB-centered teaching, hiring, programming, and culture     | Plan/Implement | Implement     | Improve       |
|                                   | 3.3 Catholic connections and outreach                            | Implement      | Improve       | Sustain       |
| 4. MODERNIZING                    | 4.1 Institution-wide technology and systems modernization        | Plan/Implement | Implement     | Improve       |
| TECHNOLOGY & SERVICE              | 4.2 IT service and support delivery model                        |                | Plan          | Implement     |
| 5. REDEFINING FINANCIAL           | 5.1 Financial literacy training and development                  | Plan           | Implement     | Improve       |
| PLANNING &                        | 5.2 Establish annual budget planning and review process          | Implement      | Improve       | Sustain       |
| MANAGEMENT                        | 5.3 Business case analysis for new programs and investments      | Implement      | Improve       | Sustain       |
|                                   | 6.1 Leverage assets for new, non-core revenue                    | Plan/Implement | Implement     | Improve       |
| 6. INCREASING FINANCIAL STABILITY | 6.2 Government funding and grants                                | Plan/Implement | Implement     | Improve       |
|                                   | 6.3 Build endowment to create strategy and contingency funds     | Plan/Implement | Implement     | Improve       |





Saint Martin's UNIVERSITY

## SECTION 4: APPENDIX



## LINKS TO PLANS & REPORTS



#### **SPC PROJECT PLAN:**

https://docs.google.com/spreadsheets/d/1fUXcTFAN9kxV\_3l6nH8LiVz7Fik5mvXn/edit?usp=sharing&ouid=100524328762353496526&rtpof=true&sd=true

#### PHASE 1 STRATEGY ASSESSMENT REPORT/SWOT ANALYSIS:

https://drive.google.com/file/d/127aLjplj1viRARGuChdfQ-Ayycuag8Sc/view?usp=sharing

## PEER INSTITUTION SELECTION CRITERIA



- Our goal is to have at least two peer comparison groups for benchmarking (when possible)
- Criteria for peer comparison group selection in rank order:
  - Institution budget / financial position
  - Size based on enrollment
  - Academic offerings (degrees, majors, certificates, etc.)
  - Private
  - Religious affiliation / mission (when available)
  - Student demographics

## CONTEXT FOR GOAL SETTING



Long-term goal setting is an iterative process with the Board (responsible for governance and approving the Strategic Plan) and the President's Cabinet (responsible for managing the Strategic Plan and delivering FY26 goals).

- FY26 goal estimates for each strategy will be presented and discussed at the Board meeting on Feb. 23
- Our goal is to gain Board approval of our proposed Strategies, Initiatives,
   Measures of Success and FY26 Goals so that we can move forward in formulating
   Annual Improvement Projects
- Once AIPs and related resource plans are set, we will take the opportunity to refine FY24-FY26 goals to ensure they are aligned and realistic

## Catholic Connections in FY22



#### Program relationships with Catholic organizations that were established and active in FY22.

#### **Academic / Professional Development**

• Diocese of Yakima - faculty and leadership development

#### **Internships/Service Learning/Career Transition**

- St. Placid's Priory
- Saint Michael Parish
- Sacred Heart Catholic Church
- Archdiocese of Seattle
- Jesuit Volunteer Corps
- Catholic Community Services
- Sisters of Saint Joseph of Peace
- Providence St. Peter Hospital
- Pope John Paul II High School
- Catholic Relief Services

#### **Admissions / Enrollment**

- John Paul II High School
- Tri-Cities Prep
- LaSalle High School
- Holy Names Academy
- O'Dea High School

#### **Catholic Associations**

- Academy of Catholic Hispanic Theologians of the United States
- Association of Catholic Colleges and Universities
- Central Washington Catholic Foundation
- NCCAA Nat Catholic College Admissions

## **ADDITIONAL CATEGORIES**



#### **DIVISION/DEPARTMENT-LEVEL STRATEGIES**

- Targeted impact (can be long- or short-term)
- One division/department is primarily responsible but may require support from other departments
- Investment (people, time, funding) responsibility primarily sits with one division/department head

#### **READY FOR ACTION – PROGRAMS/PROJECTS**

Can be acted upon with approval; no major barriers or major investments needed

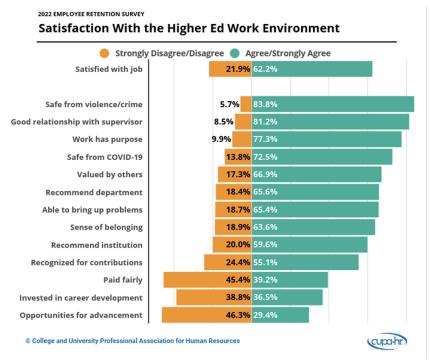
#### FOR CONSIDERATION – PROGRAMS/PROJECTS

Ideas that can be considered in the future

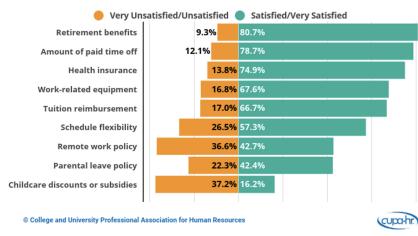
#### CUPA-HR

### **EMPLOYEE RETENTION SURVEY 2022**







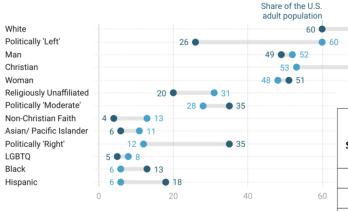


#### How well do U.S. faculty reflect America?

By Musa al-Gharbi Jan. 24, 2023



## Characteristics of Full-Time Faculty at U.S. Colleges and Universities Relative to the Adult Population (25+) of the U.S.



https://heterodoxacademy.org/blog/how-well-do-u-s-faculty-reflect-america-spoiler-not-well/

Musa al-Gharbi is a Paul F. Lazarsfeld Fellow in Sociology at Columbia University and a Daniel Bell Research Fellow at Heterodox Academy.

Breakdown of U.S. Full-Time Faculty by Rank, Race/Ethnicity, and Sex (2021)

|     | Self-Identification | Percentage of All<br>Full-Time Faculty<br>in the U.S. | Percentage of All<br>Tenured Faculty in<br>the U.S. | Percentage of All<br>Tenure-Track<br>Faculty in the<br>U.S. | Percentage of All<br>Nontenure-<br>Eligible Full-Time<br>Faculty in the U.S. |
|-----|---------------------|---|---|---|--|
|     | White               | 69.3  | 73  | 57.8  | 70.1   |
|     | AAPI                | 10.8  | 12.1  | 12.7  | 8.9  |
| and | Black               | 6.1   | 4.8   | 7.4   | 6.8  |
|     | Hispanic            | 5.5   | 5.2   | 6.4   | 5.6  |
|     | Indigenous          | 0.4   | 0.3   | 0.4   | 0.5  |
|     | Male                | 51.5  | 59.3  | 48.8  | 45.2   |
|     | Female              | 48.4  | 40.7  | 51.2  | 54.8   |

Chart: Musa al-Gharbi • Source: We Have Never Been Woke: Social Justice Discourse, Inequality and Princeton University Press) • Created with Datawrapper

#### Related article from Inside HigherEd

https://www.insidehighered.com/blogs/higher-ed-gamma/why-faculty-diversity-matters

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## IT NETWORK UPTIME METRICS





#### The Nines of Availability

Availability percentages vs service downtime

| Availability %          | Downtime      | Downtime      | Downtime per   |
|-------------------------|---------------|---------------|----------------|
| Availability 70         | per year      | per month     | week           |
| 90% (one nine)          | 36.5 days     | 72 hours      | 16.8 hours     |
| 99% (two nines)         | 3.65 days     | 7.20 hours    | 1.68 hours     |
| 99.5%                   | 1.83 days     | 3.60 hours    | 50.4 minutes   |
| 99.9% (three nines)     | 8.76 hours    | 43.8 minutes  | 10.1 minutes   |
| 99.95%                  | 4.38 hours    | 21.56 minutes | 5.04 minutes   |
| 99.99% (four nines)     | 52.56 minutes | 4.32 minutes  | 1.01 minutes   |
| 99.999% (five nines)    | 5.26 minutes  | 25.9 seconds  | 6.05 seconds   |
| 99.9999% (six nines)    | 31.5 seconds  | 2.59 seconds  | 0.605 seconds  |
| 99.99999% (seven nines) | 3.15 seconds  | 0.259 seconds | 0.0605 seconds |

Source: https://www.bmc.co m/blogs/highavailability/

## Calculating Employee Retention



The basic formula for calculating retention is:

# of individual employees who remained employed for entire measurement period /

# of employees at start of measurement period) x 100

When determining how many employees remained employed for the entire measurement period, be sure to only include those employees who were employed on both the first and last day of the period. Any workers hired within the measurement period are simply not counted, as the goal is only to track the retention of those working on day one of the measurement period.

Retention rate is often calculated on an annual basis, dividing the number of employees with one year or more of service by the number of staff in those positions one year ago. Positions added during the year would not be counted. Smaller measurement periods can be used, as when tracking more immediate results of retention initiatives, or larger periods, as when calculating the retention of those workers who stayed after a reduction in force some years ago.

This figure is quite useful to show the stability of the workforce, but the downside is that it does not track the departures of employees who joined and subsequently left during the period being tracked. Therefore, calculating the turnover rate will complement the retention rate by showing the percentage of separations in the same period. Turnover rate is often defined as the number of separations divided by the average number of employees during that same time period.

Source: SHRM https://www.shrm.org/resourcesandtools/tools-and-samples/hr-qa/pages/calculatingretentionandturnover.aspx

## Calculating Employee Turnover



The basic formula for calculating turnover is:

(# of separations during the measurement period /

average # of employees during the measurement period) x 100

The example below illustrates how retention and turnover rates are not always the inverse of each other.

In a department of eight, two people left and were replaced during the measurement period.

R (retention) =  $(6/8) \times 100 = 75$  percent

T (turnover) = (2/8) X 100 = 25 percent

However, what if during the measurement period, two positions became vacant, were filled, became vacant again and were filled again?

R = (6/8) X 100 = 75 percent

 $T = (4/8) \times 100 = 50$  percent

Clearly, tracking both metrics gives the employer a more complete picture between retained and separated employees.