2026 STRATEGIC PLAN
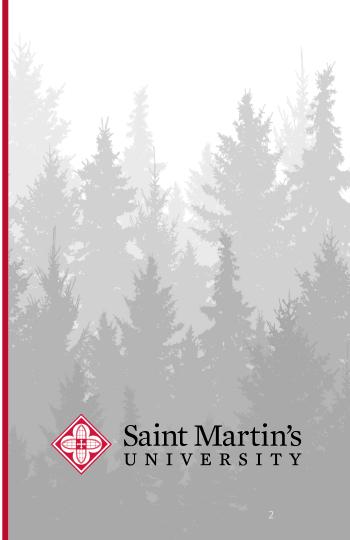
Presented to Saint Martin's Community

Last updated: June 20, 2023

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SECTION 1

Strategic Planning Process

WHAT IS STRATEGIC PLANNING?

According to Harvard Business School, strategic planning is the ongoing organizational process of using available knowledge to document a business's intended direction.

This process is used to:

- prioritize efforts,

- effectively allocate resources,

- align shareholders and employees on the organization's goals, and

- ensure those goals are backed by data and sound reasoning.

OUR APPROACH

The Strategic Planning process at Saint Martin's will be:

- Led by a Strategic Planning Committee co-chaired by President JBR and Controller Ellie Sesin with representatives from stakeholder groups (staff, faculty, administration, Abbey and Board)

- **Agile** – using a Lean-based process that includes an annual Strategy Assessment and refinement; the Plan is a living document

- **Inclusive** – offering opportunities for insights and ideas to be shared from all members of the community; supports the Catholic principle of Subsidiarity

- **Measurable** – with clearly defined owners, deliverables, resources, metrics and due dates (SMART goal approach)

- **Transparent** – providing monthly annual improvement project (AIP) status/scorecard updates and quarterly Strategy Reviews presented to the Board of Trustees

- Aligned with SMU's operating framework, budgets and available resources

- A development opportunity for our high performing team members

PHASES OF STRATEGIC PLANNING[1]

STRATEGY ASSESSMENT	STRATEGY DEVELOPMENT	STRATEGY DEPLOYMENT

STRATEGY ASSESSMENT

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

STRATEGY DEVELOPMENT

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

STRATEGY DEPLOYMENT

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

1. Adapted from the Lean Hoshin Kanri Strategic Planning process.

STRATEGY ASSESSMENT

Strategy Assessment Step	Responsible	Outputs
1. Annual Review of Strategic Plan Performance	President's Cabinet Presents to Board of Trustees	SP/AIP Final Status Report Formal Assessment of Process & Performance
2. Institutional Self Assessment	President's Cabinet Presents to Board of Trustees	SWOT Analysis Benchmarking (Aspirants, Competitors) Findings from Primary Research, Climate Surveys & Other Voice of Community Sources
3. Industry/Environment Analysis	President's Cabinet Presents to Board of Trustees	State of the Industry Research, Socio-Economic, Demographic, Political, Regulatory, Technological Trends

STRATEGY DEVELOPMENT

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

STRATEGY DEPLOYMENT

Strategy Deployment Step	Responsible	Outputs
9. Deploy Annual Improvement Projects	President's Cabinet Division/Dept Administrators AIP Leaders	AIP Team Appointments AIP Team Kickoff Meeting AIP Project Charter & Plan AIP Project Implementation AIP Scorecard
10. Quarterly Reviews of Strategic Plan Performance	President's Cabinet Division/Dept Administrators	AIP Scorecard & Status Updates

SECTION 2

Strategic Foundation

STRATEGIC FOUNDATION

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.

STRATEGIC FOUNDATION

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.

STRATEGIC FOUNDATION

INSTITUTION THEMES

Faith

Reason

Service

Community

STRATEGIC FOUNDATION

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

STRATEGIC FOUNDATION

FRAMEWORK
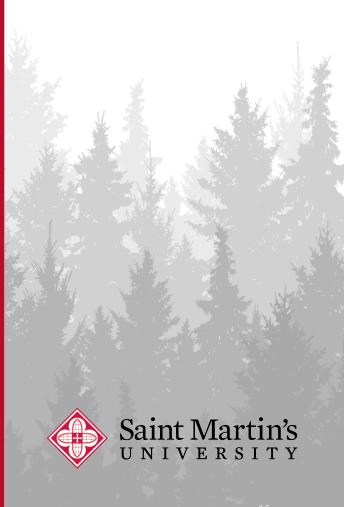
FOR STRATEGIC PRIORITES

People

Purpose

Place

Performance

SECTION 3

Strategies, Initiatives, Measures of Success & Annual Improvement Projects

Note, metrics for FY23 Results and FY24 Targets will be populated in August 2023

INVESTING IN OUR PEOPLE

Strategy 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

AIP 1.1.1: Policy & Compliance Review

AIP 1.1.2: University Structure & Organizational Planning

AIP 1.1.3: Community Wellness – Prevention & Self-care

Initiative 1.2: Ensuring equitable and competitive "total compensation" for staff and faculty

AIP 1.2.1: Full-time and Part-time Staff Compensation Plan

AIP 1.2.2: Full-time and Adjunct Faculty Compensation Plan

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.)

Begin in FY25

MEASURES OF SUCCESS

Strategy	Measures of Success	Data Source *Benchmark*	FY23 Result	FY24 Target	FY26 Goal
1. INVESTING IN OUR PEOPLE 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.	% full-time faculty retention % full-time staff retention	ADP HR System *CUPA-HR*	FTF XX% FTS XX%	FTF XX% FTS XX%	FTF 95% FTS 85%
	% full-time faculty at/above salary benchmark % adjunct faculty at/above salary benchmark	ADP HR System *CUPA-HR & IPEDS*	FTF XX% AF XX%	FTF XX% AF XX%	FTF100% AF 100%
	% full-time staff at/above salary benchmark	ADP HR System *CUPA-HR*	FTS XX%	FTS XX%	FTS 100%
	% campus climate survey scores in salary/benefits section	HERI Survey [1] *All Institutions (45%) [2]* *CUPA-HR (39%) [3]*	FTF NA FTS NA	FTF XX% FTS XX%	FTF 30% FTS 30%

[1] HERI survey is only conducted every 3 years, SMU will develop and administer an annual campus climate survey starting in FY24.
[2] 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.
[3] CUPA-HR 2022 Employee Retention Survey - 39% of respondents "agreed or strongly agreed" that they were "paid fairly".

LEVERAGING CORE CURRICULUM TO DISTINGUISH SMU

Strategy 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

AIP 2.1.1: High Impact Practices

AIP 2.1.2: Distinctive Degrees

AIP 2.1.3: Next Generation Marketing – Research Phase

Initiative 2.2: Creating a four-year graduation guarantee

AIP 2.2.1: Four Year Graduation Guarantee – Three Year Roadmap

MEASURES OF SUCCESS

Strategy	Measures of Success	Date Source *Benchmark*	FY23 Result	FY24 Target	FY26 Goal
2. LEVERAGING CORE CURRICULUM TO DISTINGUISH SMU 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.	% admitted to enrolled conversion rate [1]	Slate *EAB & MarketView* (FYFT 13%)	FYFT XX% FYGA XX% FTT XX%	FYFT NA FYGA NA FTT NA	FYFT 15% FYGA 7% FTT 35%
	# increase in total enrollment [2]	Student Info Sys *IPEDS Custom*	X,XXX	X,XXX	1,750
	% student one-year retention [3]	Student Info Sys *IPEDS Custom (FYFT 70%)*	FYFT XX% FTT XX%	FYFT XX% FTT XX%	FYFT 80% FTT 85%
	% student experience scores [4]	NSSE *Region (FY 83%, SY 88%)*	FY XX% SY XX%	FY XX% SY XX%	FY 80% SY 85%
	% 4-year and 6-year graduation rates [5]	Student Info Sys *IPEDS Custom (4Y 61%, 6Y 69%)*	4Y XX% 6Y XX%	4Y XX% 6Y XX%	4Y 50% 6Y 68%
	% 6-mo post-graduation placement [6]	Career Center Data *NACE (FW 64%, PNP 91%)*	XX%	XX%	85%

[1] First-year, full-time (FYFT); first-year, full-time, guaranteed admission (FYGA) is the inaugural year and should increase; full-time transfer (FTT)

[2] Based on Fall semester 10-day counts.

[3] 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)

[4] Requires annual administration of the NSSE student survey; NSSE 2022 "good" or "excellent" for "overall experience" of first-year (FY), senior-year (SY) students.

[5] 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.

[6] 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.

ENHANCING MISSION INTEGRATION

Strategy 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

AIP 3.1.1: Integrated First Year Student Experience (incudes COR100)

AIP 3.1.2: First Year Orientation for New Employees

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

AIP 3.2.1: Resident Scholar Focused on Catholicism & DEIB

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

AIP 3.3.1: ABCU Mission Review & Accreditation

MEASURES OF SUCCESS

Saint Martin's UNIVERSITY

Strategy	Measures of Success	Data Source *Benchmark*	FY23 Result	FY24 Target	FY26 Goal
3. ENHANCING MISSION INTEGRATION 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.	% first-year seminar success - students	Student Info Sys *No benchmark*	XX%	XX%	90%
	% first-year orientation success - new employees	ADP HR / Everfi *No benchmark*	NA	XX%	80%
	% campus climate survey score for "discrimination" [1]	HERI Survey [2] *All Institutions (19%)*	28% [1]	XX%	20%
	% of employee population that is diverse [3]	HR Info System *IPEDS Custom (FTF 15%, FTS 17%)*	FTF XX% FTS XX%	FTF XX% FTS XX%	FTF 15% FTS 22%
	# of Catholic Connection programs	Internal Spreadsheet *No benchmark*	20	NA	25

[1] Employee stress caused by "discrimination" defined as "prejudice, racism, sexism, homophobia, transphobia, etc."; HERI 2017-18; SMU 28% v. 19% "all institutions".
[2] Because the HERI survey is only conducted every 3 years, SMU will develop and administer an annual campus climate survey starting in FY24.
[3] Employees who identify themselves as racially and ethnically diverse (BiPOC).

MODERNIZING TECHNOLOGY & IT SERVICE DELIVERY

Strategy 4

Saint Martin's
UNIVERSITY

MODERNIZING TECH & IT SERVICE

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

AIP 4.1.1: Foundation for IT Modernization & Security

AIP 4.1.2: Campus Safety Policies & Technology

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

Begin in FY25

MEASURES OF SUCCESS

Strategy	Measures of Success	Data Source *Benchmark*	FY23 Result	FY24 Target	FY26 Goal
4. MODERNIZING TECHNOLOGY & IT SERVICE DELIVERY 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.	% current technology [1]	Internal Data *No benchmark*	XX%	XX%	80%
	% adherence to cybersecurity standards	Internal Data *National Institute of Standards/Tech (NIST)*	XX%	XX%	90%
	% IT network uptime	Internal Data *No benchmark*	XX%	XX%	99.5%
	% classroom technology uptime	Internal Data *No benchmark*	XX%	XX%	99.9%
	% variance to technology budget	Dynamics GP *No benchmark*	X%	X%	+/-2%
	% standard service ticket to resolution time [2]	Internal Data *No benchmark*	NA	XX%	90%

[1] Equipment, hardware, devices, systems, platforms, etc. that are not obsolete by industry standards and are supported by the manufacturer.
[2] 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.

INCREASING FINANCIAL STABILITY

Strategy 5

INCREASING FINANCIAL STABILITY

Strategy Statement 5.0: Saint Martin's University will implement new financial management methods and pursue programs that optimize the University's financial stability.

Initiative 5.1: Generating new, non-core revenue and/or cost savings

Begin in FY25

Initiative 5.2: Pursuing private and government funding and grants

Begin in FY25

Initiative 5.3: Building the endowment to create a strategic plan fund and an operational contingency fund

AIP 5.3.1: Grow the Endowment

Initiative 5.4: Establishing new financial management policies, practices and training to improve institutional alignment and accountability while reducing financial risk

AIP 5.4.1: Financial Literacy Training & Toolkit

AIP 5.4.2: Center for Career & Calling Financial Continuity Plan

MEASURES OF SUCCESS

Strategy	Measures of Success	Data Source *Benchmark*	FY23 Result	FY24 Target	FY26 Goal
5. INCREASING FINANCIAL STABILITY Saint Martin's University will implement new financial management methods and pursue programs that optimize the University's financial stability.	% of non-tuition revenue [1]	Dynamics GP *IPEDS Custom*	XX%	XX%	42%
	$ value of grants and contracts (new, total)	Slate & Excel *IPEDS Custom*	N $XM [2] T $XM [2]	N $XM T $XM	N $1M T $9.5M
	$ value of endowment (invested)	US Bank *IPEDS Custom/CASE VSE ($185M median)*	$36M	NA	$50M
	Operational contingency fund - % of annual operating budget	Dynamics GP *No benchmark*	NA	X%	3% [3]
	Strategic plan fund - % of annual operating budget	Dynamics GP *No benchmark*	NA	X%	2% [3]
	% variance to established annual institutional budget	Dynamics GP *No benchmark*	X%	+/-2%	+/-2%

[1] Includes all revenue sources except tuition; FY22 Results reflect unusual one-time events such as a $5M donation and HEERF grant funding.
[2] Includes HEERF grant funding.
[3] FY26 Goals are cumulative amounts;, for example 1% in FY24; 1% in FY25; 1% in FY26.

SECTION 4

FY24 Annual Improvement Project Summaries

POLICY & COMPLIANCE REVIEW

Saint Martin's UNIVERSITY

Unmet Need	SMU leadership and an outside HR consultant identified the need for a thorough compliance review by a third-party reviewer. Current policies are difficult to navigate and lack consistency regarding responsible parties and procedures.
AIP Objective	To complete a thorough compliance review to identify gaps and risks, and to take the necessary actions to ensure compliance with all federal and WA state laws; update policy documents accordingly; provide communication and training on new policy documents to members of the SMU community.

Major Deliverables	Resources	Primary Project Metric(s)
1. Compliance review of 15+ policy documents including employee handbook & student code of conduct 2. Risks & recommendations report 3. Policy document updates 4. Communication & training for SMU employees and students	Team Leader: Stefanie Powell Team Members: Bobby Hanna, Justin Stern, Don Conant, Gina Armer, Mary Jo Hartman	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: % of policies in compliance JOP: TBD from review by 10/1/23 FY24 Goal: 95%

UNIVERSITY STRUCTURE & ORGANIZATIONAL PLANNING

Saint Martin's UNIVERSITY

Unmet Need	A review of the SMU's overall structure is overdue. This has created a perception of misaligned resource allocation (people & budgets), a lack of transparency in the evaluation of roles, responsibilities, accountability, and inequitable compensation and workload.
AIP Objective	To conduct a comprehensive review of SMU's organizational structure (staff & faculty) and make formal recommendations to the Board to optimize the University's structure (people & budgets) and operating performance while increasing student success rates.

Major Deliverables	Resources	Primary Project Metric(s)
1. Philosophy, goals, measures report 2. Current state assessment report 3. Industry research & aspirant benchmarking report 4. Future state scenarios report 5. Recommendation to Board in 5/24 for FY25 implementation	Team Leader: Tanya Smith Brice Team Members: David Price, Jill Walsh, Geoffrey Brown, Melanie Richardson, Aaron Coby	Metric: On-time project milestones for staff/admin workstream JOP: NA FY24 Goal: 95% Metric: On-time project milestones for Academic Affairs workstream JOP: NA FY24 Goal: 95%

COMMUNITY WELLNESS PREVENTION & SELF-CARE

Saint Martin's UNIVERSITY

Unmet Need	Industry trends and SMU-specific research indicate a significant concern about the wellness and mental health of our students, staff and faculty, which can impact the performance and retention of each group. SMU does not currently have an upstream/non-clinical program focused on wellness and mental health.
AIP Objective	To improve the overall wellness and mental health of the SMU community by developing a comprehensive program (communications, events, learning forums, etc.) focused on awareness, prevention and self-care for students, staff and faculty.

Major Deliverables	Resources	Primary Project Metric(s)
1. Current state assessment report 2. Philosophy, goals, measures report 3. Industry benchmarking 4. SMU program design options 5. Voice of Community feedback 6. Secure corporate sponsor(s) 7. Begin program "phase 1"	Team Leader: Terry Hickey Team Members: Lindsay Meyer, Stephen Parker, Corrie Walton-Macaulay, Jamie Nixon, Rhian Peterman	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: % of sponsorship $ goal JOP: NA FY24 Goal: 50%

FULL-TIME & PART-TIME STAFF COMPENSATION PLAN

Saint Martin's UNIVERSITY

Unmet Need	SMU does not have a documented compensation philosophy, policy or plan for full and part-time staff. The current compensation practice (100% of the CUPA-HR median) is not documented and does not address salary increases based on merit, longevity or skill advancement, nor career progression paths.
AIP Objective	To research, develop and present for approval staff compensation policies and a three-year compensation plan that is transparent, viable and strategic in order to support equitable, competitive compensation for full and part-time staff with consideration for merit, longevity and cost of living.

Major Deliverables	Resources	Primary Project Metric(s)
1. Philosophy, goals, measures report 2. Research, benchmarking, budget models 3. Voice of Staff inputs 4. Staff compensation policies doc 5. Three-year staff compensation proposal 6. FY25 implementation plan	Team Leader: Michael Otter-Johnson Team Members: Cynthia Johnson, Abby Kheriaty, Marki Carson, Sarah Haugh, Erin Meade	Metric: Staff at/above benchmark JOP: FY24 Goal: 100% Metric: Staff approval of compensation plan JOP: 75% FY24 Goal: 80%

FULL-TIME & ADJUNCT FACULTY COMPENSATION PLAN – PHASE 2

Unmet Need	The faculty compensation structure is viewed as inequitable between the Colleges (i.e., different pay structure & workload) and regarding new hires (v. current faculty) – lowering faculty workplace and compensation satisfaction and increasing retention risk.
AIP Objective	To create a single compensation plan for faculty (full-time & adjunct) to ensure that faculty are equitably compensated for their contributions (role, performance, experience, etc.), to increase faculty's compensation satisfaction, and to retain highly qualified faculty to fulfill SMU's mission.

Major Deliverables	Resources	Primary Project Metric(s)
1. Philosophy, goals, measures report 2. Research, benchmarking, budget models 3. Voice of Faculty inputs (surveys, discussion forums, etc.) 4. Three-year faculty compensation proposal 5. FY25 implementation plan	Team Leader: Alexis Walker Team Members: Rico Picone, Ian Werrett, Alexandra Onno, Frank Kersul, Liz Nutter	Metric: Faculty at/above benchmark JOP: FY24 Goal: 100% Metric: Compensation satisfaction JOP: FY24 Goal: 30%

HIGH IMPACT PRACTICES

Unmet Need	SMU lacks a well-defined philosophy, goals, definitions, roles and integrated curricular and co-curricular programming needed to elevate the transformational role of High Impact Practices (as defined by ACCU includes service learning, study abroad, internships, research, etc.) in our students' learning journey.
AIP Objective	To conduct a comprehensive assessment of SMU's use of curricular and co-curricular High Impact Practices (HIP), prepare recommendations to improve the quality, equity, accessibility and student engagement in HIP, and ensure the use of HIP in SMU curriculum across all course levels.

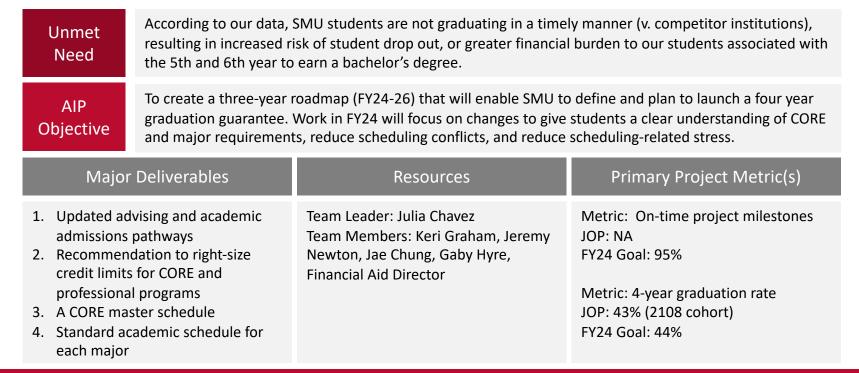| Major Deliverables	Resources	Primary Project Metric(s)
1. HIP SWOT analysis report 2. Philosophy, guiding principles, goals, measures report 3. Voice of Student, Voice of Faculty 4. HIP future state recommendations 5. SMU HIP three-year roadmap 6. FY25 resource plan (people & budget)	Team Leader: Roger Douglas Team Members: Ann Adams, Prashant Joshi, Lori Sirs, Arwyn Smalley, Ronda Vandergriff	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: JOP: FY24 Goal:

DISTINCTIVE DEGREES

Unmet Need	Many of today's students, parents and employers do not understand the purpose or value of a Liberal Arts education due to more emphasis on technical/professional skills to meet employers' needs. SMU has not repositioned its academic value proposition to effectively compete in this environment.
AIP Objective	To explore different curriculum models, including a dual-major model, that will create greater value for students and employers, while putting greater emphasis on the critical skills that students gain from a Liberal Arts education.

Major Deliverables	Resources	Primary Project Metric(s)
1. Student, employer insights report 2. LA curriculum benchmarking & best practices report 3. Curriculum model options report 4. Voice of Faculty 5. Recommendation & FY25 implementation plan to Cabinet, BoT at May 2024 Board Mtg	Team Leader: Tanya Smith Brice Team Members: Todd Barosky, Stephen Mead, Patty Lemon, Floraliza Bornasal, Matondo Wawa	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: Voice of Faculty engagement JOP: NA FY24 Goal: 75%

NEXT GENERATION MARKETING – RESEARCH PHASE

Saint Martin's UNIVERSITY

Unmet Need	With the transition from Millennials to Generation Z, prospective students' and families' expectations and criteria have shifted, and enrollment continues to decline across higher ed. Amid these trends, and in anticipation of a curriculum strategies, we need research to guide branding and value prop updates.
AIP Objective	To conduct brand research and gain unique insights about prospective students' and families' perceptions of SMU, competitors and key decision factors. Research completed in FY24 will guide a next-gen value proposition that optimizes founding traditions and the anticipated SMU curriculum strategies in FY25+.

Major Deliverables	Resources	Primary Project Metric(s)
1. Brand research methods & project plan 2. Brand research implementation 3. Brand research analysis & findings report 4. Next-gen marketing recommendations 5. FY25 implementation plan	Team Leader: Nate Peters Team Members: Caitlin Gordon, Heidi Schnebly, Jamie Diedrich, Lisa Power, Scot Gladstone	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: Research survey response rate JOP: NA FY24 Goal: 10%

FOUR YEAR GRADUATION GUARANTEE – THREE YEAR ROADMAP

Saint Martin's UNIVERSITY

Unmet Need	According to our data, SMU students are not graduating in a timely manner (v. competitor institutions), resulting in increased risk of student drop out, or greater financial burden to our students associated with the 5th and 6th year to earn a bachelor's degree.
AIP Objective	To create a three-year roadmap (FY24-26) that will enable SMU to define and plan to launch a four year graduation guarantee. Work in FY24 will focus on changes to give students a clear understanding of CORE and major requirements, reduce scheduling conflicts, and reduce scheduling-related stress.

Major Deliverables	Resources	Primary Project Metric(s)
1. Updated advising and academic admissions pathways 2. Recommendation to right-size credit limits for CORE and professional programs 3. A CORE master schedule 4. Standard academic schedule for each major	Team Leader: Julia Chavez Team Members: Keri Graham, Jeremy Newton, Jae Chung, Gaby Hyre, Financial Aid Director	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: 4-year graduation rate JOP: 43% (2108 cohort) FY24 Goal: 44%

INTEGRATED FIRST YEAR STUDENT EXPERIENCE (INCLUDES COR100)

Saint Martin's UNIVERSITY

Unmet Need	Student feedback and survey data indicate an inconsistent first year student experience due to lack of strategy, mapping and communication between first year programs including orientation, AHANA, Welcome Weekend and COR100, and that COR100 does not meet students' needs.
AIP Objective	To create an integrated first year student experience by following an educational design process to evaluate and redesign SMU's first year experience based on proven models; to redesign COR100 based on students' feedback and industry best-practices. FY24 is a planning year. FY25 is an implementation year.

Major Deliverables	Resources	Primary Project Metric(s)
1. Philosophy, goals, measures 2. Phase 1: Analysis & Exploration 3. Phase 2: Design & Construction 4. Phase 3: Prototypes Presentation & Voice of Community 5. Phase 4: Selection & Approval 6. FY25 Implementation Plan	Team Leader: Alexis Nelson Team Members: Dustin Zemel, Kate Ball, Lele Tuvalu/Gaby Hyre, David Price/New COR100 Director, Kaycee Selga	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: JOP: FY24 Goal:

FIRST YEAR ORIENTATION FOR NEW EMPLOYEES

Saint Martin's UNIVERSITY

Unmet Need	SMU does not have a consistent process for new staff and faculty to engage in value exploration, mission integration and community expectations at SMU. As a result, new employees learn about SMU's founding traditions, mission, values, history, culture and standard operating practices in an ad hoc manner.
AIP Objective	To develop and pilot a program to welcome and onboard new employees during their first year at SMU by creating a forum for them to learn about SMU's founding traditions, mission, values, history, culture and standard operating practices, while creating space for the cohort to foster relationships. Pilot begins 1/24.

Major Deliverables	Resources	Primary Project Metric(s)
1. Philosophy, goals, measures 2. Benchmark established seminars 3. Seminar syllabus 4. Master calendar 5. Session instructors & content 6. Develop communications, logistics & attendance tracking methods 7. Launch orientation pilot in 1/24	Team Leader: Nedra Robertson Team Members: Crystal Cardona, Celeste Trimble, Dave Bocook, Katrina Edmundson	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: New employee* participation in pilot JOP: NA FY24 Goal: 80%

*Hired within 12 months prior to the pilot.

RESIDENT SCHOLAR FOCUSED ON CATHOLICISM & DEIB

Unmet Need	There is a lack of conversation at SMU regarding the intersection of complex issues, especially race, gender and belonging at a Catholic institution. In addition, there is a lack of diversity of Catholic voices and leadership representation at SMU.
AIP Objective	To create curricular and co-curricular opportunities for the campus community to engage in complex issues related to race, gender and belonging at a Catholic institution; to dedicate a scholar role focused on connecting with students, especially students of color, in FY24.

Major Deliverables	Resources	Primary Project Metric(s)
1. Course(s) in Benedictine Leadership Program 2. Friday Faculty Luncheon speaker 3. Breaking Bread dialogue series 4. Affinity space for BIPOC students 5. Keynote speaker: Racism as a Life Issue 6. Community outreach & PR	Team Leader: John Hopkins Team Members: Nikki Berry, Nick Coffman, Ramon Luzarraga, Irina Gendelman, Emily Podowicz	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: "I belong at this institution" rating from BIPOC students JOP: 4.6/7 FY24 Goal: 5.5/7

ABCU MISSION REVIEW & ACCREDITATION

Unmet Need	The Association of Benedictine Colleges and Universities (ABCU) has amended their Bylaws and is now requiring members to earn accreditation by completing two efforts: 1) Mission Presence and Integration Self-Study Report and 2) Final Mission Presence and Integration Report.
AIP Objective	To ensure that SMU is well-positioned to meet the new ABCU accreditation requirements by completing the Mission Presence and Integration Self-Study Report (step 1) in FY24 and preparing for a successful Final Mission Presence and Integration Report (step 2) to be submitted in FY25.

Major Deliverables	Resources	Primary Project Metric(s)
1. Timeline & committee to ABCU 2. Campus communication plan 3. Complete self-study sections 1-4 based on Voice of Community 4. Draft self-study report for Cabinet, BoT review & approval 5. Submit self-study report to ABCU 6. FY25 plan to complete step 2	Team Leader: Fr. Kilian Malvey Team Members: Tedi Reynolds, Kristine Stottlemyre/John Raacke, Jackie Clark, Jenn Christiansen, Mc Erl Dave Andres	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: % community groups engaged in self-study process JOP: NA FY24 Goal: 100%

FOUNDATION FOR IT MODERNIZATION & SECURITY

Saint Martin's UNIVERSITY

Unmet Need	50% of SMU's technology (networks, servers, computers, software, etc.) is obsolete by industry standards resulting in unacceptable downtime, disruption to teaching and operations. SMU does not have policies or programs for technology obsolescence management, platform standardization nor security standards.
AIP Objective	To complete a comprehensive SMU technology/security assessment, benchmark industry best-practices, create a three-year technology/security investment and implementation plan. Begin implementation in FY24 (year one) and present a resource plan for major upgrades in FY25 (year two).

Major Deliverables	Resources	Primary Project Metric(s)
1. Comprehensive technology assessment report 2. Security audit report 3. Industry benchmarking report 4. Three-year investment & implementation plan 5. FY24 (year one) implementation 6. FY25 (year two) resource plan	Team Leader: Mary Donahoo Team Members: Erin Hoiland, Stefanie Gorzelsky, Radana Dvorak, Debbie Long, Carl Lew	Metric: % hardware that is current JOP: 50% FY24 Goal: 60% Metric: % security to industry standards JOP: NA FY24 Goal: TBD (based on audit)

CAMPUS SAFETY POLICIES & TECHNOLOGY

Saint Martin's UNIVERSITY

Unmet Need	The campus safety policies, practices and supporting technology are out of date and ineffective. Survey results indicate that students do not feel safe on campus (esp. at night). The physical campus security cameras and access card systems are obsolete (no longer supported by mfg). Policies need review.
AIP Objective	To complete a comprehensive assessment of SMU's campus safety policies, practices and supporting technologies and develop a two-year implementation plan that includes policy updates, employee and student training, student safety awareness campaigns, and technology upgrades.

Major Deliverables	Resources	Primary Project Metric(s)
1. Policies, practices, technologies assessment report 2. Policy & training updates 3. New security camera system installation plan 4. FY25 resource plan (includes new access card system, student safety campaign NCSAM)	Team Leader: Sharon Schnebly Team Members: Kali Miller-Haque, Garrett Russell, Philip Cheek, Jocelyn Bonilla, Kael Moffat	Metric: On-time project milestones JOP: NA FY24 Goal: 95% Metric: New camera system installation & training completion JOP: NA FY24 Goal: 100%

GROW THE ENDOWMENT

Unmet Need	SMU needs to significantly grow endowment funds. SMU's existing Endowment Market Value growth is substantially behind our peers and aspirational institutions. SMU is not prepared to leverage emerging opportunities, remain competitive in the market, and ensure fiscal stability for future generations.
AIP Objective	To evaluate SMU's current endowment policies and historical performance (vs. peers and aspirants) and make recommendations for improvements that will 1) improve the overall financial performance of SMU's endowment and 2) ensure endowment allocations are strategically aligned with SMU's needs.

Major Deliverables	Resources	Primary Project Metric(s)
1. Endowment policies & performance evaluation 2. Revise Gift Acceptance policy 3. Establish Legacy Endowment 4. Establish Capital Investment Endowment 5. Gain Board of Trustees approvals 6. Launch Endowment marketing	Team Leader: Shad Hanselman Team Members: Ellie Sesin, Br. Nicolaus Wilson, Kathleen McKain, Teresa Winstead, Teri Woo	Metric: SMU Endowment Value JOP: $36M FY24 Goal: $42.5M* Metric: On-time project milestones JOP: NA FY24 Goal: 95%

*FY24 Projection includes anticipated Endowment growth from regular giving and the implementation of both proposed programs.

FINANCIAL LITERACY TRAINING & TOOLKIT

Unmet Need	No financial training or resources are available to budget managers, unit heads, or cabinet members. Many individuals tasked with managing the financial health of SMU lack the essential financial knowledge, skills and tools they need, which leads to decision making that lacks financial accountability.
AIP Objective	To develop and implement mandatory financial literacy and policy training program (+toolkit) to give SMU budget managers the knowledge, skills and resources for effective financial planning, budget management, investment approvals, financial compliance and transactions required for their roles.

Major Deliverables	Resources	Primary Project Metric(s)
1. Develop financial literacy & policy training content 2. Conduct training (mandatory for all budget managers) 3. Online financial management toolkit 4. New employee financial literacy & policy training method	Team Leader: Ellie Sesin Team Members: Alana Langdon, Suzanne Chaille, Renee Oram, Steve O'Brien, Melissa Delikat	Metric: Budget managers who complete training program JOP: NA FY24 Goal: 95% Metric: On-time project milestones JOP: NA FY24 Goal: 95%

CENTER FOR CAREER & CALLING CONTINUITY PLAN

Saint Martin's UNIVERSITY

Unmet Need	The Title III Grant that supports the Center for Career & Calling (CCC) expires in 2025. To fulfill SMU's contractual commitment, we must create a resource plan in FY24 to maintain CCC operating continuity including Internship Hub, online services and student programming (internship fairs, career treks, etc.).
AIP Objective	To develop an FY25 Resource Plan (people & budget) to maintain CCC services focused on student internships and experiential learning programs (High Impact Practices) known to build social capital and support student retention, persistence to graduation and post-graduation placement rates.

Major Deliverables	Resources	Primary Project Metric(s)
1. CCC services & performance "baseline" (current state) 2. Marketing plan to generate new sponsorships & revenue streams 3. FY25 CCC continuity resource plan (people, programming, events, sponsorships, endowment, etc.)	Team Leader: Ann Adams Team Members: Emma Rice, Diane Bingaman, Sam Fox, Tim Madeley, IA Staff	Metric: Title III grant compliance JOP: NA FY24 Goal: 100% Metric: # of CCC sponsors & career fair partners JOP: 10 FY24 Goal: 20

THANK YOU!

We appreciate our community's ongoing participation in the Strategic Planning Process.

Please email the Strategic Planning Committee at StrategicPlan@stmartin.edu if you have any comments or questions as we continue this important work!

Saint Martin's
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