

Momentum: Muhlenberg's Strategic Plan 2010 – 2015

(rev. 9/30/10)

as approved by the Muhlenberg College Board of Trustees,
October 30, 2010

The Vision

During the second decade of the twenty-first century, Muhlenberg College will strengthen its competitive position among our nation's leading private residential liberal arts colleges. We will increasingly become a school of choice for highly talented students by asserting national leadership in selected liberal arts and pre-professional fields, increasing ethnic, geographic, religious, and socio-economic diversity within our close-knit campus community, providing appropriate financial aid for our students, setting a new standard for enabling our graduates to identify and realize their post-graduate goals, and securing our standing as a well-managed, financially strong private college.

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Executive Summary

Capitalizing on strong institutional momentum, Muhlenberg's new strategic plan will guide the College through a time of economic and demographic turbulence, advancing its quality and reputation and leaving it stronger and more respected than at any time in its history.

The planning process has been broadly consultative, and we believe it articulates a vision of our future shared by trustees, faculty, staff, students, alumni, parents, and other Muhlenberg stakeholders.

The plan will be fiscally responsible, utilizing the budget model which proved instrumental in the success of the previous plan. It will focus on Muhlenberg's value proposition: striving to strengthen the College's appeal to talented prospective students and to make the quality of the Muhlenberg educational experience worth its premium cost. While the budget model does assume continued growth and success of the College's fundraising efforts, it does not call for additional debt.

The plan focuses on initiatives that will:

- strengthen the academic, co-curricular, and extra-curricular student experience.
- Enrich diversity; and
- improve efficiency and sustainability.

Introduction

The Muhlenberg community developed its previous strategic plan (*The Talents Entrusted to Our Care*, or *TETOC*) during 2003-2004, reviewed and revised that plan in 2007, and completed its implementation in 2009-10.

TETOC focused on:

- new and renovated facilities (a new Science building, renovation of Shankweiler and Trumbower, expansion and renovation of Seegers Union, six new residence halls¹, creation of a new Multicultural Center, expansion and renovation of Hillel, classroom, laboratory and office space for sociology and anthropology, and renovation of the former TKE fraternity house as Rehearsal House with offices, studios, and practice facilities for music, theatre, and dance);
- new tenure-track positions (in art history, biology, film studies, music history, political science, psychology/neuroscience, sociology/anthropology);
- new curricular initiatives (African-American studies, film studies, finance, neuroscience, public health); and
- expanded opportunities for experiential learning (study abroad, internships, service learning, individual and collaborative research).

The plan was funded by a combination of bonds for capital projects and an expanded, lengthened comprehensive fundraising campaign (also named *TETOC*) that raised \$110.4 million for endowment, operating support, and facilities. *TETOC*'s overarching goal was to strengthen Muhlenberg's position in a highly competitive admissions marketplace by enhancing the value of the Muhlenberg experience. By this measure, the plan has been successful. The College's "win rate" over its top six admissions competitors has improved over the past five years, while our "win rate" over our other benchmark institutions has remained consistently above 55% during that period.²

*Momentum*³ *Muhlenberg's Strategic Plan for 2010-2015* shares some important features with *TETOC*:

- a continued commitment to Muhlenberg's traditional mission and values as a private, residential, coeducational liberal arts college affiliated with the Lutheran Church (ELCA);⁴
- a broadly inclusive planning process involving trustees, faculty, staff, students, alumni, and parents;

¹ 2201 Chew Street (48 beds); The Village (145 beds)

² The "win rate" refers to the percentage of students accepted by Muhlenberg and each competitor who matriculate at Muhlenberg. Muhlenberg's "Big Six" admissions overlap schools include Bucknell, Dickinson, Franklin & Marshall, Gettysburg, Lafayette, and Lehigh. The remaining benchmark schools include Drew, Ithaca, Skidmore, Susquehanna, Ursinus, Villanova, and Wheaton.

³ *Momentum* is an unofficial placeholder for the name of the next strategic plan.

⁴ The College's mission statement can be found on page 5; the College's institutional values are attached as Appendix 1.

- an emphasis on enhancing Muhlenberg's value proposition in an increasingly competitive admissions market; and
- insistence on a balanced budget, including regular reviews of the budget model underlying the plan's investments.

Momentum will also *differ* significantly from *TETOC* in several notable ways:

- The recent recession, continuing economic uncertainty, the continuing demographic decline, and incipient price resistance will make a conservative and flexible financial model more important than ever.
- Our current debt load makes further borrowing inadvisable during this planning period. The recent completion of the comprehensive campaign on June 30, 2010, makes it impractical to set ambitious increases in fundraising goals until current pledges have been paid and our donor base is prepared for a new campaign.
- Consequently, the new plan will focus less on big-ticket investments such as new buildings, new faculty lines, and new programs. Instead it will emphasize low cost/high value strategies and initiatives designed to strengthen infrastructure, integrate and improve existing programs, find and implement cost-saving measures, and advance Muhlenberg's reputation. As a result, the new plan will be even more flexible and nimble than *TETOC*, with its major investments in buildings and tenure-track positions. Initiatives that do not yield the anticipated benefits can be altered or eliminated, with resources diverted to other more promising initiatives.

I. Muhlenberg's Mission⁵

Muhlenberg College aims to develop independent critical thinkers who are intellectually agile, characterized by a zest for reasoned and civil debate, committed to understanding the diversity of the human experience, able to express ideas with clarity and grace, committed to life-long learning, equipped with ethical and civic values, and prepared for lives of leadership and service. The College is committed to providing an intellectually rigorous undergraduate education within the context of a supportive, diverse residential community. Our curriculum integrates the traditional liberal arts with selected pre-professional studies. Our faculty are passionate about teaching, value close relationships with students, and are committed to the pedagogical and intellectual importance of research. All members of our community are committed to educating the whole person through experiences within and beyond the classroom. Honoring its historical heritage from the Lutheran Church and its continuing connection with the Evangelical Lutheran Church in America, Muhlenberg encourages, welcomes, and celebrates a variety of faith traditions and spiritual perspectives.

⁵ The current version of Muhlenberg's mission statement was developed by faculty, students, staff, alumni, parents, and trustees during the 2003-2004 planning process; it was reviewed again in 2007-2008, and in 2009 when it was slightly modified in response to suggestions from the Muhlenberg community.

II. Muhlenberg's Values

Inextricably linked to the College's mission are the values that guide us in its pursuit. These values, articulated at length in Appendix 1, derive from our conviction that education is best accomplished within the context of a caring community that embraces not only the campus, but also extends to our neighborhood, our city, our state, our nation, and our world. The plan will strengthen the Muhlenberg model of liberal education: strengthening students' intellectual abilities by linking theory and practice, so that they understand the civic, ethical, and vocational implications of ideas and values. The plan also emphasizes the College community's responsibility to our neighbors and to future generations by encouraging sustainable practices.

III. The Planning Process

The process that produced this plan began in July 2009, when the President shared a proposed planning process with the Trustees, faculty, staff, Parents Council, Alumni Board, and student body, and solicited comments both on the process itself and on key documents from the previous plan (including the mission statement, fundamental institutional values, and the strategic planning principles).

A new President's Planning Group (PPG) was formed in September 2009, including six faculty representatives (one elected by each division, three appointed by the President), three student representatives, one member of the managerial staff, one member of the support staff, one member of the service personnel, and the senior staff of the College. The PPG met approximately bi-weekly throughout the 2009-2010 academic year as well as once in September 2010. In addition to members of the PPG, various faculty and staff participated in the group's discussions as warranted by the agenda. (See Appendix 2 for a list of faculty, staff, and student participants).

PPG reviewed all suggested revisions to the key planning documents, incorporating some of them in a draft shared with the Board of Trustees and campus community in December 2009. PPG also conducted an "environmental scan" of the financial and demographic factors affecting private liberal arts higher education, developed a SWOT analysis of Muhlenberg's competitive position, and reviewed benchmark data from the College's top 12 admissions overlap institutions. During the fall semester, PPG agreed on a Vision Statement (Ultimate Goal) and six strategic goals for the next plan. These were shared with the Muhlenberg community in an interim report in December 2009, and discussed at an open Strategic Planning Forum attended by students, faculty, staff, alumni, and members of the local community on campus in February 2010.

Early in the 2010 spring semester, members of the College community were invited to submit initiatives that would support the strategic goals using a standardized web-based format, and many did so. Appropriate committees of the Board of Trustees reviewed early versions of the initiatives and other planning documents during the January and April Board meetings.

PPG then evaluated the proposed initiatives using the Strategic Planning Guidelines (Section V, below) and selected those that seemed to have the greatest potential for achieving our strategic goals within the constraints of our budget model.

The goals and supporting initiatives were discussed and broadly endorsed by the Board of Trustees at its retreat on June 18, 2010. At that time, the President was asked to write a penultimate draft of the strategic plan during the summer, review that draft with PPG at the beginning of the fall semester, and then present it to the Board for final approval at the October 2010 meeting.

This plan is strategic, not operational. It identifies broad goals, proposes specific strategies, suggests institutional directions, and sets financial priorities. At the same time, if it was unclear whether a specific initiative was strategic or tactical, PPG erred on the side of inclusiveness.

The plan should not and will not override the prerogatives of the faculty, which, through its committees, must consider and amend or approve some of the initiatives suggested in the plan. Neither will the plan overlook the important continuing role of student leaders and members of the staff in the process of implementation. Operational plans for the implementation of other initiatives in the plan will be the responsibility of various College committees, faculty, and staff.

Regular assessment of Muhlenberg's progress is essential to the success of the plan and, ultimately, to the continued success of the College. This assessment will take several forms:

1. The goals themselves will be assessed at least annually. As the future reveals itself we must assure ourselves that we have chosen the right goals, and that changing circumstances have not altered our commitment to these goals, the priority we assign them, or our ability to achieve them. While goals that have been articulated through careful deliberation and consultation should not be changed capriciously or autocratically, we must remain open and flexible. A good strategic plan is never carved in stone.
2. The assumptions on which our financial model is based will be assessed at least annually, and budget adjustments will be made to assure that we can continue to afford the implementation of the plan.
3. We will monitor at least annually the progress of the various faculty committees and offices of the College in developing and implementing operational plans to bring strategic initiatives to reality.
4. Once specific initiatives are implemented, we will assess their effectiveness in achieving our strategic goals.
5. The College will continue to nurture a culture of planning and assessment to ensure that such activities are ongoing and become institutionalized. The implementation of the Board of Observers Visiting Committee program, approved by the Trustees in January, 2004, will continue to play an important role in this effort.

IV. Muhlenberg and the Competitive Environment

Muhlenberg competes with similar institutions for bright students, excellent faculty, charitable gifts and grants, and families' educational investments – vital resources that are essential to its goal of achieving distinction in liberal arts education. This plan takes it as given that the most effective way to prevail in this competition is to continually and maximally improve the quality of the College and the value of a Muhlenberg education in those ways that matter most to our stakeholders.

Benchmark Institutions

At the outset of this planning process, the President's Staff and PPG agreed on a roster of twelve institutions with which Muhlenberg has significant admissions overlap (i.e. with which we compete for students) and to which Muhlenberg is essentially similar in mission and character. We utilize this benchmark group in comparing resources and measuring performance.⁶

Bucknell University
Dickinson College
Drew University
Franklin and Marshall College
Gettysburg College
Ithaca College
Lafayette College
Lehigh University
Skidmore College
Susquehanna University
Ursinus College
Villanova University

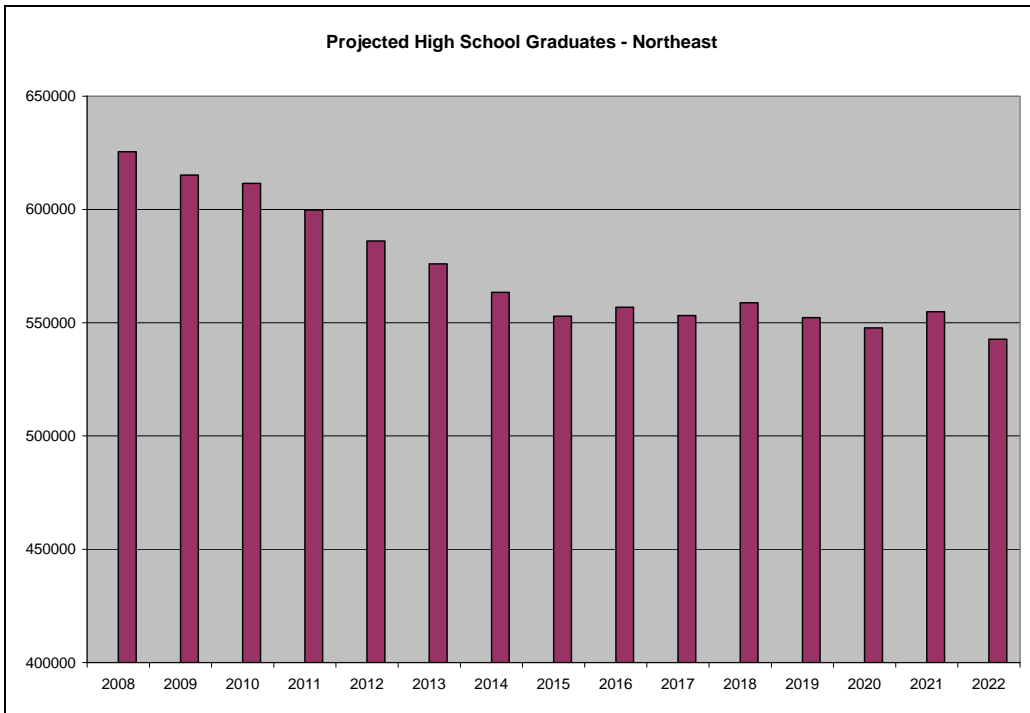
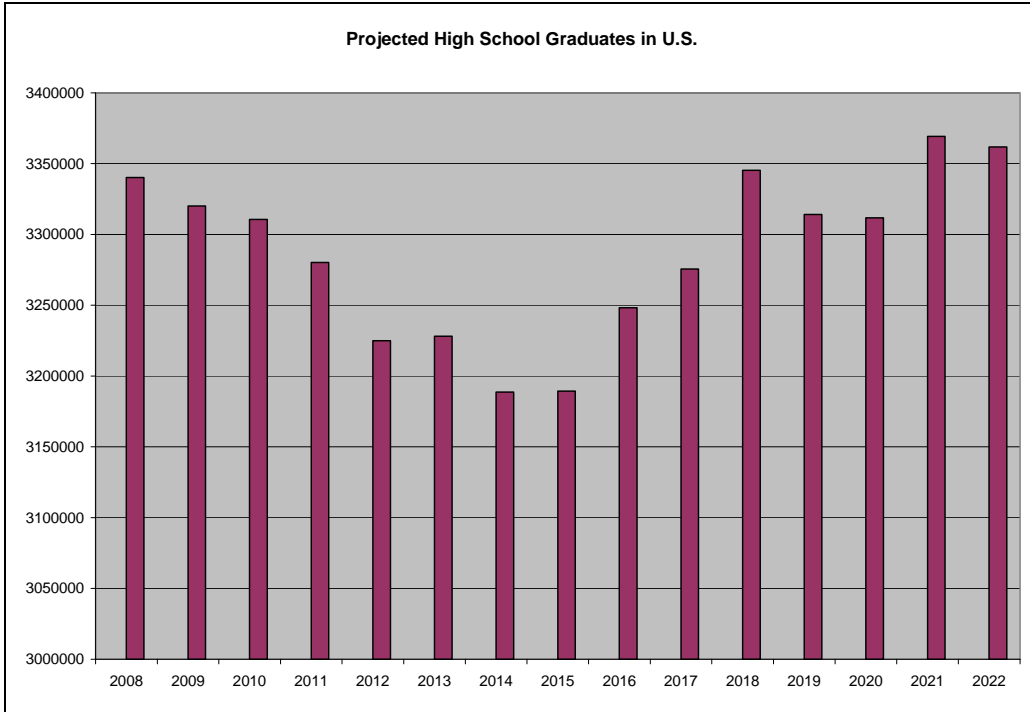
Demographics

Muhlenberg competes with its benchmark and other institutions for the best high school graduates in its efforts to increase the College's selectivity, academic quality and reputation. The number of high school graduates, especially in the northeast United States from which we draw the preponderance of our students, is an essential factor in this competition.

- Nationally, the number of high school graduates will decline for most of the next five years, beginning to rebound after 2015. When the rebound begins, it will largely be driven by growth in the Hispanic/Latino populations of Florida, Texas, and California. These have not been traditional feeder states for Muhlenberg.
- The number of 18-year olds in the northeast United States, Muhlenberg's traditional feeder region, has been declining since 2008 and will continue to decline until at least 2022.⁷

⁶ This is the same benchmark group used in TETOC, with the exception of Wheaton College in Norton, MA, which no longer shares significant admissions overlap with Muhlenberg and, therefore, has been deleted from the list.

⁷ Projections provided by Western Interstate Commission for Higher Education (WICHE) in collaboration with the College Board and the U.S. Census Bureau.



Another cause for concern is the ability and willingness of families to pay for high quality private education. As tuitions increase and the economy struggles, cost and the availability of financial aid are becoming increasingly important.

- Moody’s 2009 reports: “Declines in household net worth are likely to be the largest in decades as both investment holdings and home equity fall simultaneously, placing significant

pressure on ability and willingness to pay high tuition rates...[while] access to student loans and other financing that has been utilized in prior years has become scarcer. . . .”

- The Princeton Review’s 2010 “College Hopes and Worries Survey” reported that 51% of students and parents are applying to more “financial aid safety schools” as a result of the poor economy.
- The most recent StudentPoll conducted by the College Board and the Art & Science Group found that families ranked “availability of financial aid” and “cost of attendance” third and fourth respectively among factors driving college choice (academic quality and campus safety ranked first and second).
- CIRP⁸ data reflect similar trends. In 1977 18% of students entering college ranked financial aid as “very important” to their choice. By 2007 that number had reached 40%.
- Private institutions’ market share of college students has slipped from 40% in 1959 to 21% in 1975 to 19.2% in 2008.⁹

Clearly, competition will continue to be keen for the most academically gifted high school graduates who are willing to consider private liberal arts institutions and whose families are able to pay the premium cost of such an education.

To prevail, Muhlenberg must – both in public perception and in reality – offer an educational experience of very high value, while keeping costs down and budgeting adequate financial aid. To accomplish this, we must understand the market’s perception of our strengths and weaknesses and we must capitalize on this knowledge to leverage our assets, minimize our vulnerabilities, correct misperceptions that undervalue our existing strengths, communicate the availability of financial aid, and respond to changing market conditions.

Major Competitive Strengths and Weaknesses

In assessing market perceptions of Muhlenberg’s competitive strengths and weaknesses the PPG analyzed data from:

- the 2009 Admitted Student Questionnaire (ASQ), which offers comparative data on Muhlenberg matriculants and students admitted to Muhlenberg who chose to attend competitor institutions;
- the 2008 National Survey of Student Engagement (NSSE), which provides comparative student evaluations of their academic experience;
- a 2007 freshman survey conducted by the Association of Independent Colleges and Universities of Pennsylvania (AICUP);
- a 2008 College Senior Survey (CSS) from the Higher Education Research Institute; and
- more general market research on enrollment trends in private higher education.

⁸ Cooperative Institute Research Program, part of the Higher Education Research Institute at UCLA

⁹ Recent reports claiming an increasing market share for private higher education include for-profit institutions. Market share of for-profit institutions has increased from 0.36% in 1975 to 7.7% in 2008. Source: National Center for Education Statistics.

Muhlenberg's signature strength is its campus climate, characterized by a strong sense of community, a warm and friendly atmosphere, strong/close student-faculty relationships, and an ethos that extends itself on behalf of students and student success. Survey data demonstrate that our reputation for a supportive campus environment clearly distinguishes us from our major competitors. Other strengths perceived and highly valued by students include our commitment to undergraduate teaching, personal attention to students, extracurricular activities, academic facilities, religious diversity, and the attractiveness of the campus. The freshman year experience wins high marks for its academic challenge and strong advising program. While many institutions have curtailed athletic programs due to financial hardship, Muhlenberg endorses the educational value of athletic activity, especially in the context of the academically rigorous Centennial Conference. This is highly attractive to certain segments of our admissions market and we see no strategic reason to reduce the College's commitment to its athletic program in the current environment.

While all Muhlenberg students report high levels of satisfaction with their courses and overall experience, the College does not score as high as many of our benchmark institutions in academic reputation, academic challenge and enriching academic experiences – especially in students' senior year. In particular, Muhlenberg seems to offer fewer “capstone” courses or experiences for its seniors and fewer opportunities for substantive discussion with others who have different beliefs and backgrounds.

Conclusions

Our institutional strategy must, consequently:

- preserve and enhance Muhlenberg's “caring community” ethos and the beauty of our campus environment;
- continue to build our reputation for academic excellence, and make the case that a Muhlenberg education is a sound investment;
- increase and enhance campus diversity. This implies not only the recruitment of a more diverse faculty and student body, but also a higher level of community understanding about the differences among its members;
- enrich and increase the rigor of the senior year experience;
- maintain aggressive recruiting efforts in the northeast United States, while developing a more competitive admissions presence in selected states beyond the region and internationally.

The principles governing our strategic planning process recognize and derive from these market imperatives.

V. Muhlenberg College Strategic Planning Principles (Revised, June 18, 2010)

1. To continue Muhlenberg's impressive progress in recent years, the plan must give highest priority to the quality and distinctiveness of the academic program, while addressing other aspects of the student experience that enhance undergraduate education and the lessons to be

learned from participation in a tolerant, nurturing, and ethical community. The most promising strategic initiatives will attract and retain talented students, challenge them intellectually, nurture and develop their abilities, and increase institutional visibility.

2. The College's plans will be ambitious within the discipline of a balanced budget. No initiatives will be undertaken without a thoughtful analysis of their financial impact on the College within the context of a comprehensive budget and staffing model. Because the financial future is unpredictable, the Strategic Plan must be flexible in its ability to respond to changing fiscal realities.
3. The plan should reflect Muhlenberg's core values and focus on Muhlenberg's traditional mission and strengths, refining, improving, and building upon these distinctive aspects of the College, rather than seeking new programmatic directions outside the scope of our current mission.
4. The plan will recognize the importance of Muhlenberg's location in Allentown and the Lehigh Valley, and will seek to improve the advantages of this location through cooperative relations with the community. We will also seek to capitalize on our location in the Middle Atlantic region and the opportunities presented by our proximity to the resources of major metropolitan areas, such as New York City, Philadelphia, and Washington DC, as well as natural resources in the region.
5. The plan should strengthen Muhlenberg students' ability to achieve the educational outcomes that are important to them, including preparation for and acceptance to graduate and professional school and the ability to compete successfully for meaningful opportunities in the world of work.

VI. Strategic Goals (Revised June 18, 2010)

During the first stage of the planning process, the community also agreed on six over-arching strategic goals that would guide the development and prioritization of Muhlenberg's investment in specific strategic initiatives:

1. Strengthen the academic program through targeted investments in faculty, staff, and facilities that build on existing assets and capitalize on promising curricular and co-curricular opportunities to make Muhlenberg more appealing to the most talented prospective students. In doing so, we will re-deploy resources, leverage resources through the judicious use of technology, and collaborate with partner institutions to provide our students with a rich array of educational opportunities both during and after their time at Muhlenberg.
2. Strengthen our culture of engaged teaching and learning that emphasizes the development of analytical skills and intellectual ability, as well as the integration of knowledge. This will require continued investment in experiential learning (internships, study abroad, service learning, student research) and in faculty development (pedagogical strategies, research), and ongoing curriculum renewal (general education, majors, minors).

3. Explore more effective ways of preparing Muhlenberg students for lives of leadership and service by strengthening links among academic departments, co-curricular programs and Career Services, exploring additional articulation agreements with other high-quality educational institutions, creative uses of existing break periods, and researching accelerated degree programs for qualified students. Focus especially on the senior year as a culminating experience that stimulates reflection and integration of knowledge, and that prepares our graduates to achieve their post-graduate goals.
4. Strengthen Muhlenberg's recruiting efforts in its traditional feeder areas while exploring ways to expand and diversify its pool of potential students. Maintain and improve our high retention rates.
5. Maintain and further develop the campus to reduce resource costs and improve sustainability.
6. Significantly strengthen the financial position of the College through careful management of debt, superior investment performance, endowment growth, successful expansion of fundraising efforts, and the development of stronger relationships with stakeholders. Aggressively examine ways to make more effective use of facilities during summers and other periods to maximize revenue and raise the College's profile with prospective students.

VII. Strategic Initiatives (Organized by Goal)

1. **Strengthen the academic program through targeted investments in faculty, staff, and facilities that build on existing assets and capitalize on promising curricular and co-curricular opportunities to make Muhlenberg more appealing to the most talented prospective students. In doing so, we will re-deploy resources, leverage resources through the judicious use of technology, and collaborate with partner institutions to provide our students with a rich array of educational opportunities both during and after their time at Muhlenberg.**

- 1.1 Academic Technology Structure

Establish an Academic Technologies (AT) structure to support faculty exploration and adoption of effective and innovative uses of technologies to enhance student learning experiences, to assist faculty with technological needs within their own research areas, and to facilitate College service. This process will include additional resources for AT in the form of a dedicated instructional design team. An instructional designer will work with the various constituencies to develop pedagogical and curricular integration partnerships, training, and research and development programs. A faculty release/stipend program will ensure that technology is implemented in a way that is relevant and appropriate to real classroom settings, and will better facilitate dissemination, adoption, and understanding of learning technologies to all faculty. An advisory committee will work with AT to develop priorities and provide regular input on emerging needs.

- 1.2 Formalize Information Literacy Integration

The College will develop an institutional definition of Information Literacy, recognizing Information Literacy as an important part of the overall College strategic plan and addressing the concerns noted in both the Middle States report and in the NCES questions.

1.3 Rebuild the Library Collection (50% of request)

The ultimate goal of this initiative is to return to the five-year plan of collection funding increases which adds funds at a rate of 5% each year. This will begin to rebuild the current collections budget line and reestablish our standing within the Interlibrary Loan community.

1.4 Upgrade/Change Course Management Software & E-portfolios

Determine and implement the best course management software solution for Muhlenberg. Various options include Moodle, an open source product; staying with Blackboard Basic edition; or upgrading to Blackboard Enterprise edition. All options require staff support by OIT. This initiative includes the implementation of software supporting student e-portfolios – electronic documents that enable each student to integrate, share, and reflect upon intellectual and artistic work at Muhlenberg.

1.5 Trumbower Renovations

During the planning for the construction of the New Science building, benchmarking was done to see how much research space other institutions provide their faculty. With the construction of New Science, the renovation of Shankweiler and some renovations in Trumbower, most science faculty now have 600 sq.ft. of research space – comparable to our peer institutions. The renovation projects proposed here will help bring the entire science faculty up to this standard. Having the renovated research space will help faculty and students be more productive and help with the recruitment of top notch students and faculty to Muhlenberg.

1.6 Expand Wireless Coverage

Expand wireless coverage and capacity on campus from 40% to 100% by the beginning of the second semester of 2012-13; provide guest access; fully integrate security with existing resources with attention to ensuring a viable mobile environment. Acquire and/or develop the means for secure wireless access to materials and communications critical to the mission of the College.

1.7 Economic Engagement with the Lehigh Valley¹⁰

Explore with the LVAIC Consortium a program that would allow students to use “Flex dollars” at local restaurants and businesses, increasing the College’s institutional visibility and improving the advantages of our geographical location through cooperative relations in the community.

1.8 Muhlenberg-Allentown Committee

Create an ad-hoc committee of faculty, staff and students charged with developing plans to strengthen the College's connections to its host city. The committee will offer recommendations in two categories: (a) zero or very low-cost; and (b) more substantial proposals, in the expectation that only the first sort would be easily implemented. One working assumption of the committee will be that the College's long-term fortunes are linked to the real and perceived health of Allentown and its downtown, for student and faculty recruitment and retention. The committee will study the initiatives of other colleges and universities located in challenged cities. Among the possible range of recommendations such a committee could issue: shuttle route changes; local housing information for faculty and staff; co-sponsored events; an

¹⁰ Implemented only if possible through LVAIC Consortium

expansion of the modest mortgage assistance grants envisioned in the last strategic update, to include the city's downtown neighborhoods; and a downtown teaching or performance space.

1.9 Reinforce/Expand/Deepen Community Engagement

Expand transportation possibilities and establish office oversight to facilitate more opportunities for bi-directional community collaborations. Expand community projects database through collaboration with relevant campus offices which already have applicable information. Institutionalize support for academic service-learning and establish standardized elements of practice through an established learning community and outreach to faculty and community partners. Enhance visibility of the Office of Community Service and Civic Engagement through public relations efforts thereby increasing possibility for outside funding and establishing a clear connection point for community organizations and individuals. Conduct outcomes-based assessment to measure learning outcomes for students, community and facilitators and publicize results. Collaborate with colleagues across campus to create developmental model for community engagement including a programmatic schema that runs throughout the Division of Student Affairs. Collaborate with the Multicultural Center to engage the campus community with issues related to diversity.

1.10 Explore Language Teaching Consortium with LVAIC

Work with LVAIC partner schools to explore the possibility of offering high quality, video-conferenced courses in Italian, leading to a pilot program for consortial technology-assisted language instruction.

2. Strengthen our culture of engaged teaching and learning that emphasizes the development of analytical skills and intellectual ability, as well as the integration of knowledge. This will require continued investment in experiential learning (internships, study abroad, service learning, student research) and in faculty development (pedagogical strategies, research), and ongoing curriculum renewal (general education, majors, minors).

2.1 Support Conversion to New General Education Curriculum (when approved)

Once the faculty has approved a new general education curriculum, the Provost will invest in faculty development opportunities to revise existing courses and align them with the newly adopted goals and outcomes. Summer and winter break workshops will provide faculty with the opportunities to research new materials, revise syllabi, and develop assignments that express the new vision of general education within the curriculum.

2.2 Faculty Leadership Development

This initiative proposes the institution of formal, ongoing faculty leadership training targeted at department chairs, program directors, and committee chairs using existing faculty development funds.

2.3 Faculty Scholarship (50% of request)

Increase summer support for faculty scholarship to allow faculty to bring an invigorated spirit to the classroom as they begin a new academic year. Create a pool of funds to offset research expenses to be awarded by the Faculty Development and Scholarship Committee (FDSC) on a competitive basis.

2.4 Theory to Practice Project

Convene a faculty learning community to explore the application of neuroscience research on learning to classroom pedagogies. The goals of the learning community are 1) to increase faculty's understanding of the neuroscience research on learning, 2) to provide support for pedagogical revision that is informed by this research, and 3) to assess the effect of these course revisions on student learning.

2.5 Strengthening Student Research (50% of request)

Expand the current pool of funds for student travel to present, perform or exhibit; fund one additional summer research position (for a total of eight), including stipend, housing and one unit of course credit; provide course relief for a faculty coordinator to provide leadership, including data collection and tracking, and secretarial support for the faculty member.

3. Explore more effective ways of preparing Muhlenberg students for lives of leadership and service by strengthening links among academic departments, co-curricular programs and Career Services, exploring additional articulation agreements with other high-quality educational institutions, creative uses of existing break periods, and researching accelerated degree programs for qualified students. Focus especially on the senior year as a culminating experience that stimulates reflection and integration of knowledge, and that prepares our graduates to achieve their post-graduate goals.

3.1 Academic Resource Center (ARC) Part-time Program Coordinator

Hire a Program Coordinator responsible for hiring and supervising Peer Learning Assistants (LAs) for gateway classes, planning and scheduling all workshops run by LAs, maintaining up-to-date electronic records on the LA program, tracking attendance at workshops and supervising all relevant data entry done by work-study students, supervising LAs, and working with the Director to assist faculty partners.

3.2 Conversation about Vocation¹¹

Spark a conversation about vocation – an understanding that each person has a call to use his/her particular gifts/skills in service of his/her life and of those around them. Challenge students and employees to ask the "WHY?" questions in various areas of their lives, make the "WHY?" question and to consider vocation a regular part of our campus conversation, and equip students and employees to think in such a way throughout life in order to enhance their decisions and successes.

3.3 Developmental Model of Career Education

Create a new Muhlenberg model for career education by integrating early and ongoing discussions with students about their career goals through existing relationships with academic advising, pre-health advising, pre-law advising, athletics, academic departments, the Academic Resource Center, and other offices. Increase the hours of the Director of the Senior Year Experience (SYE) from 800 to 1250 per year to enable

¹¹ Initiatives 3.2, 3.3, 3.4, 3.8, 3.10 and the e-portfolio segment of 1.5 will require careful coordination. We envision the first step in the implementation of these steps as the engagement of a student development consultant and the organization of a "learning community" bringing key staff into dialogue about the best way to articulate student development goals and to coordinate relevant programs.

the Director to fully support the reflection, integration and transition components of the initiative.

3.4 Four-Year Developmental Plan

Form a multi-constituent team to discuss and recommend an intentional, four-year developmental model for our students that capitalizes on existing efforts, explores relevant new opportunities, and establishes measurable learning outcomes. Examine June Advising, Orientation Weekend and the First-Year Seminar for opportunities to be more intentional about students' behavioral, affective and cognitive development; consider the inclusion of a service learning component within Orientation Weekend.

3.5 Professional Development for Work/Study Students

Provide professional development workshops for work-study students, enhancing students' skills and contributions towards College departments and programming. Potential workshops may include skills such as: building a website, facilitating discussions, outcomes assessment, planning a workshop, creating eye-catching fliers, writing newspaper articles, sending effective emails, reserving campus facilities, and leadership training.

3.6 Software for Academic Resource Center Data Collection

Select and implement a relational data entry and management system to examine outcomes for tutees and workshop participants, process payroll for tutors, and keep track of appointments with Learning Specialists.

3.7 Strengthen Services for Disabled Students

Expand staffing of the Office of Disability Services to expand its operations to 12 months.

3.8 Strengths-based Campus

Utilize the Gallup Organization's StrengthsQuest assessment tool to strengthen student leadership development. Reallocate duties for some staff to include serving as Strengths Coaches and Advocates.

3.9 Articulation Agreement with Jewish Theological Seminary (JTS) in New York and Lutheran Theological Seminary of Philadelphia (LTSP)

Create additional opportunities for Muhlenberg students as they prepare for lives of leadership and service. The articulation agreement with JTS will permit our students to take courses for our Jewish Studies minor and to pursue the study of the Hebrew language at a more advanced level than we currently offer. The agreement with LTS will be a post-baccalaureate program allowing the College to offer a provisional "dual acceptance" to Muhlenberg and LTSP.

3.10 Strengthen Advising Partnership

Research, implement and publicize a coherent advising model for the four years to signal to internal and external constituents the importance of advising. Make sure that

the partnership which at its core is between student and academic advisor, extends across the campus and is consistent with the liberal arts experience.

3.11 Explore a Three-Year Degree Option

Muhlenberg will explore the possibilities of a three-year baccalaureate degree program enabling qualified students to complete a full undergraduate program in three-quarters of the normal time, thus saving tuition costs and accelerating their ability to begin their careers. The three-year degree might involve a combination of Advanced Placement credit, summer session courses, and a five-course per semester course load.

4. Strengthen Muhlenberg's recruiting efforts in its traditional feeder areas while exploring ways to expand and diversify its pool of potential students.

4.1 Consortium for Faculty Diversity

Strengthen our efforts to enrich the diversity of Muhlenberg faculty by joining this Consortium.

4.2 Intergroup Dialogue

Provide funds for training and travel for faculty and student facilitators in the Intergroup Dialogues program, a series of conversations carefully structured to explore social group identity, conflict, community, and social justice.

4.3 Jump Start Program

The Jump Start Program will be based on an assessment of our start-up efforts (summer 2009-spring 2010) and continued conversations within the current core group of faculty and staff, convened by the Dean of Academic Life, and selected others. Components of the program will include pieces currently offered and new components. The program will include special advising in June, a week-long pre-orientation program in August, year-long work with selected faculty mentors, and ongoing discussions and monitoring by the core group. The pre-orientation program would include, but not be limited to: testing through instruments such as the LASSI and SRI, followed up by consultation with learning specialists in the Academic Resource Center; diagnostic and preliminary work in writing, perhaps including the assignment of a Writing Tutor; a library scavenger hunt; conversations with multicultural mentors and introduction to Multicultural Life and the Director of that site; and social opportunities such as a luncheon at the President's house and the family/student welcome luncheon at the beginning of pre-orientation. Links to community mentors, including Board of Associates, will also be a part of the program.

4.4 Explore Targeted Recruitment Initiatives Abroad & in U.S.

Expand the boundaries of our traditional feeder areas while exploring new recruitment territories outside the traditional areas (including California, Texas, Colorado, Chicago and Florida in the U.S., and India abroad).

5. Maintain and further develop the campus to reduce resource costs and improve sustainability.

5.1 Bottled Water Reduction¹²

Install filtered water fountains across campus in community spaces, offices and dorms in order to support efforts to reduce bottled water use, to reduce the need for bottled water and thus model environmentally responsible behavior, and reduce the use of bottled water on campus.

5.2 Creation of the Office of Campus Sustainability

Formally recognize and promote campus greening/ sustainability efforts by creating an Office of Campus Sustainability, staffed by the Sustainability Coordinator and the Director of Sustainability Studies, thereby formally linking academic, student life, and plant operations aspects of campus sustainability. The Office will also have a large web presence to further promote campus greening efforts. The Office of Campus Sustainability will bring together students, faculty and staff with a diversity of perspectives and areas of expertise to seek creative solutions for campus sustainability.

5.3 Reduce Costs/Improve Sustainability

5.3.1: Evaluate and propose applications and resources to insure responsible use of consumables campus-wide (e.g, usage tracking and/or cost recovery of paper and toner). Implement sustainability applications already identified. Target the percentage of EPEAT Gold-rated desktop hardware purchased by the College to be at least 85% of total purchases.

5.3.2: Plan the transition from provisioning College-owned technologies to the facilitation of user-owned and public technologies, to accomplish relevant budget relief. Eliminate default provisioning of residence hall telephone lines per bed, provide alternate emergency/house telephones; eliminate such ports from PBX maintenance, reducing annual PBX maintenance costs by approximately \$20K and reducing related IT staff efforts by approximately 240 hours annually. Significantly reduce cost to repair residential phone lines – in 2008-09 we spent in excess of \$5K for such repairs. Redesign public computing spaces to accommodate user-owned laptops in a collaborative environment and provide wireless services including printing; reduce the number of College-provided PCs in such spaces. A 30% reduction would reduce College-owned equipment by \$100K+.

5.4 Energy Reduction

5.4.1: Replace the existing steam to water converter system with a gas fired water heating system to provide heating of the Baker Center for the Arts year round.

5.4.2: Conduct detailed energy audits for all major building on campus¹³ in accordance with the detailed American Society of Heating Refrigerating and Air-

¹² Fund filtered water stations through special projects budget

Conditioning Engineers (ASHRAE) Level II Audit program. This type of audit details all energy used in a facility and has been proven to identify significant savings opportunities, many of which can be implemented at little or no material cost by using existing staff.

5.4.3: Complete a Level II ASHRAE energy audit of Moyer Hall. This detailed audit of the building and energy analysis, along with system performance testing, will provide for a breakdown of how energy is used in the building as well as suggest a broader range of savings options, including simple capital investments.

5.4.4: Install occupancy sensors to turn off lights when people are not present. Install occupancy sensors in classrooms and offices in the following buildings: Trexler Library (stack areas not included), Trexler Pavilion, Moyer Hall, Trumbower, Ettinger, Haas College Center and Baker Center for the Arts.

5.4.5: Install steam meters in buildings that use steam from the Boiler Plant. Readings can be used to track steam consumption efficiency, providing data to better define specifics of future project needs and update estimates of costs.

5.4.6: Complete a detailed ASHRAE Level II energy audit of Trexler Library. This detailed audit of the building and energy analysis, along with system performance testing, will provide for a breakdown of how energy is used in the building as well as suggest a broader range of savings options, including simple capital investments.

5.5 Analyze Other Cost Reduction/Revenue Enhancing Suggestions

Analyze cost saving and revenue enhancing suggestions made by PPG and other members of the Muhlenberg community.

6. Significantly strengthen the financial position of the College through careful management of debt, superior investment performance, endowment growth, successful expansion of fundraising efforts, and the development of stronger relationships with stakeholders. Aggressively examine ways to make more effective use of facilities to maximize revenue and raise the College's profile with prospective students.

6.1 Expansion of Summer Conference Program

Increase campus activity, attract more people to campus, support summer academic programming and generate new revenue by formalizing a Summer Meeting & Conference Program.

¹³ Ettinger, Seegers, Trumbower, Shankweiler, New Science, Walz, Brown, Martin Luther, East, LSC, Haas, Prosser, CA, Trexler Pavilion, Benfer, South, and Robertson.

- 6.2 Renovation of Generals Quarters
Expand and renovate the General's Quarters, Seegers Union Office Suite and the Information Desk to enhance first impressions by campus visitors, improve program and customer satisfaction and accommodate the growing needs and expectations of the Office of Seegers Union and Campus Events.
- 6.3 Improve Communication Among Areas
The College Committee on Information Technology (CCIT) will oversee the implementation of a plan to promote communication, improve information sharing, solicit feedback and prioritize requests to provide recommendations on allocation of resources (e.g., human, technological, or financial) in which all key constituencies are represented.
- 6.4 IT Administrative Structure
Create a structure consisting of infrastructure, administrative, academic, and student subgroups that communicate with their constituencies, each other, and the College Committee on Information Technology (CCIT). Since CCIT has representatives from each of these subgroups, issues that filter up will be considered by CCIT so that it can form recommendations for the President. Furthermore, decisions and information made by the committee will be more effectively communicated to the campus community.
- 6.5 Refinance Debt for More Favorable Terms/Less Risk
When market conditions indicate that current debt obligations can be refinanced to either reduce annual debt service or reduce the risk profile of the overall debt portfolio, bonds will be issued to retire the appropriate portion of the portfolio.
- 6.6 Document Imaging Solution
Select and implement a document imaging solution that will improve business processes, reduce paper usage, and adequately house documents for archiving/retrieval.
- 6.7 Reinvent and Reinvigorate Fund Raising for Muhlenberg
Develop and implement strategies that increase alumni engagement and participation as volunteers and donors, while laying the groundwork for the College's next capital campaign.

VIII. Additional Initiatives to Be Scheduled in Years 3-5 of Plan, Budget Permitting

- 1.3 Rebuild the Library Collection
Fund remaining 50% of initiative not provided in the first year of implementation.
- 1.12 Replace Student Information System Software

1.13 Minor in Non-profit Management

Create a minor in nonprofit management during the curriculum revision process which combines key elements of the ABE curriculum and focuses on particular issues facing the nonprofit sector. An Arts Management concentration has already been approved by the faculty, and will appear in the 2010-11 Catalog.

2.5 Strengthening Student Research

Fund remaining 50% of initiative not provided in the first year of implementation.

3.12 Director of Living Learning Experiences

Create a faculty position through course release to lead the development of, as well as lend credibility to, Living-Learning programs. Provide professional development for the Director and incentive grants for faculty teaching curricular Living-Learning Experiences.

6.8 Business Continuity Planning

Contract with a partner to complete a business continuity plan. Complete an IT-related disaster recovery plan, based upon the business continuity plan and implement disaster recovery drills, predicated upon the plan. Complete server virtualization to facilitate disaster recovery.

IX. The Financial Plan

The Budget Model

A realistic plan must be achievable within the footprint of a balanced budget. We will not undertake strategic initiatives without knowing how we are going to pay for them.

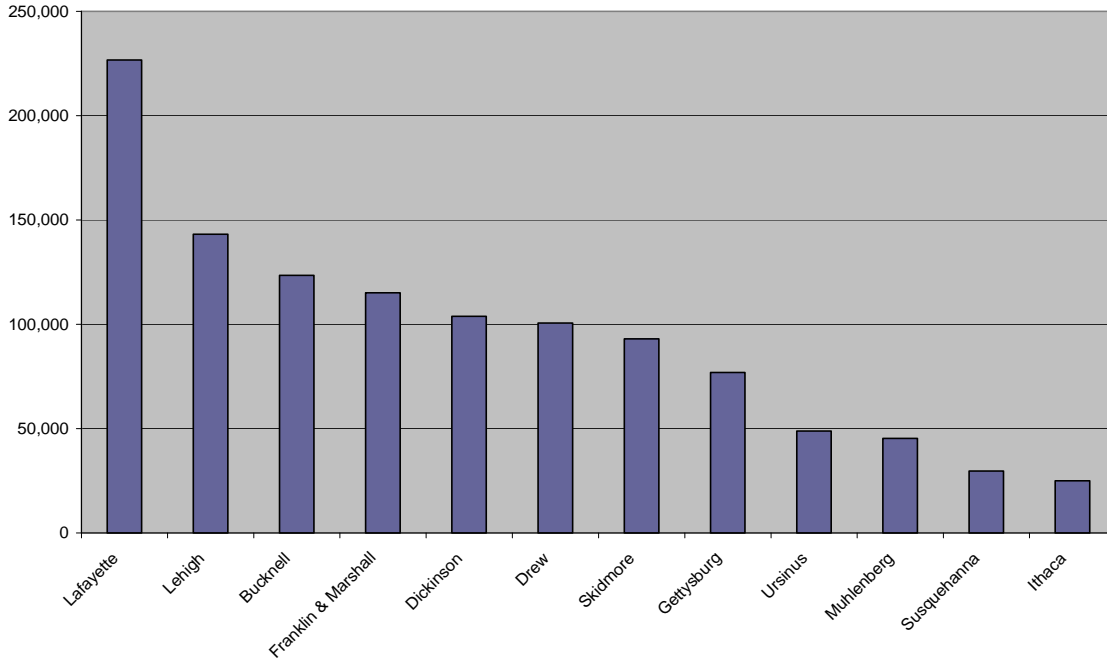
The budget model developed during the 2003-2004 planning cycle proved a valuable tool to both assess the affordability of initiatives and monitor our progress and the feasibility of the plan during the five years of its implementation. Though the model never predicted Muhlenberg's financial performance precisely, favorable and unfavorable variances generally offset each other and allowed us to complete virtually all of the proposed initiatives as well as some additional objectives identified during the mid-plan review.

This plan will use a similar budget model, incorporating assumptions about projected changes in annual costs (compensation, health benefits, financial aid, operating budgets, etc.) and revenues (student charges, Wescoe School net income, endowment income, charitable giving, etc.). As before, we will review the model's performance annually before committing to the next round of strategic investments.

Our concerted effort to build endowment during the last campaign was very successful. More than \$37 million in endowment gifts and commitments were secured during the Campaign, and though the markets have been volatile we are a much better endowed institution than in 2003. Nonetheless, Muhlenberg remains under-endowed compared to its benchmark institutions. This circumstance, combined with student charges that are 6.5% lower than our benchmark group

average, means that Muhlenberg has fewer resources to spend on each student’s educational experience than do most of our competitors.

Muhlenberg and its Benchmarks - Endowment Per Student as of 6/30/09



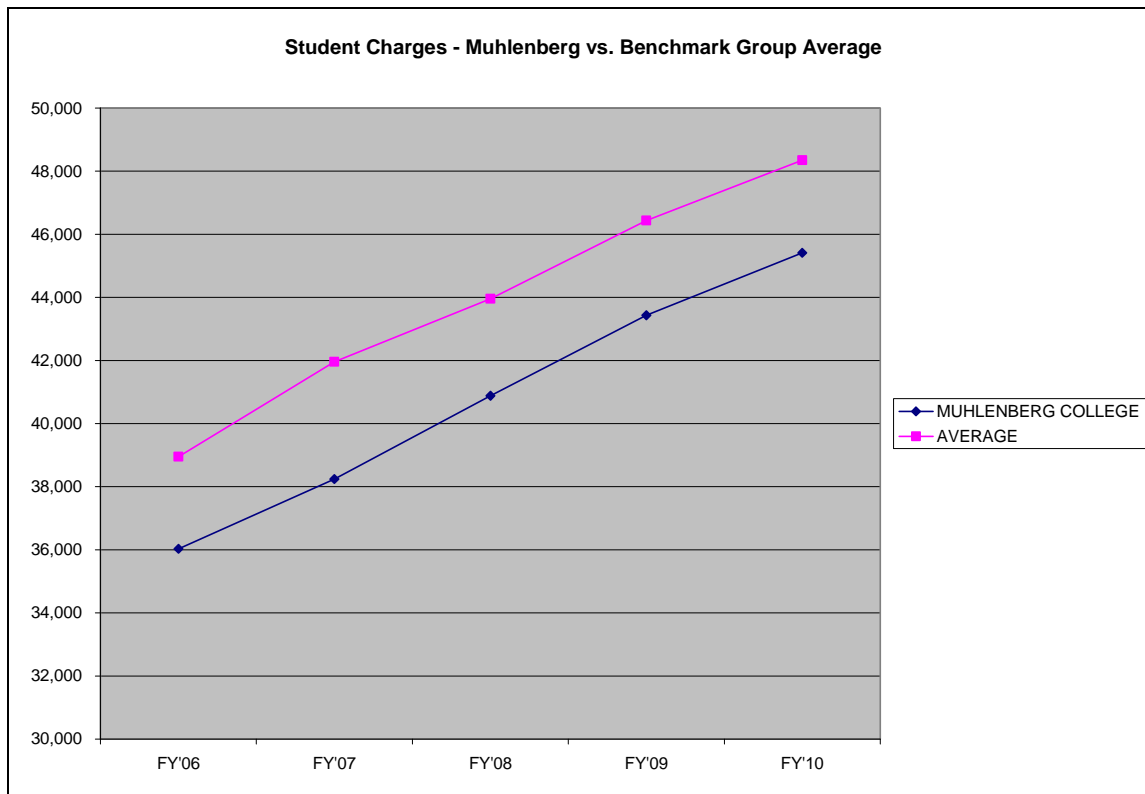
Fortunately, Muhlenberg has a strong track record of focusing its resources on high-impact priorities – particularly instruction and student services (rather than, for example, administration) – compared to its benchmark group.

We will need to continue our emphasis on endowment growth, while maintaining strong enrollments, a relatively low discount rate, and a successful fundraising program. Although interest rates continue to be relatively low and the College’s bond rating remains strong, we have determined that the College’s debt load is at an appropriate level. Barring any unforeseen circumstances, the new plan does not call for additional borrowing.

We will adjust the plan as necessary in future years to maintain a balanced budget in response to changing circumstances. We have made the following adjustments to the budget model to create resources for the strategic plan:

- Beginning in FY’11 we will try to invest at least \$500,000 from the annual “special projects” budget in strategic initiatives, totaling \$2.5 million over five years. We will supplement this amount, as possible, with additional allocations from annual surpluses *if* we are fortunate enough to have surpluses and *if* the Board of Trustees approves such allocations. Obviously these possible additions cannot be predicted. Given the College’s current debt service, we do not anticipate further bond issues for capital projects during the time span of this strategic plan.

- In FY'12 we will reduce discretionary operating budgets (i.e. excluding health benefits and utilities) by 1.5% across the board to generate resources for strategic initiatives. The model restores annual operating budget increases of 2% beginning in FY'13.
- Although we will *not* increase the College's current undergraduate (day student) enrollment and the budget model *will* preserve a minimum 50-student enrollment cushion, beginning in FY'11 we will capture additional revenue by adding 10 students to the budgeted enrollment assumption. (The current gap between actual and budgeted enrollment is in excess of 100 students; we do not propose to reduce this gap by more than 10 students because of the potential need for additional financial aid in the future). At several points during the first strategic planning period we weighed the advantages and disadvantages of decreasing, increasing, or maintaining the current enrollment level of approximately 2150 students. There has been strong opposition to a significant increase in enrollments from students, alumni, and trustees who generally agree that a much larger student population would not only strain our facilities, but also damage the quality of the Muhlenberg experience.
- Muhlenberg will strive to remain a "value leader" among our benchmark institutions, though perhaps not by so wide a margin as we have managed during the past decade. Accordingly, the budget model for the plan anticipates continued increases in student charges at or slightly above the percentage increases of our benchmark institutions. This will allow reasonable annual increases in the operating budget (including the salary pool) to sustain the quality of existing programs.



The combination of comparatively low endowment and comparatively low student charges in relation to our benchmark group of competitors means that Muhlenberg must continue to be extremely strategic in its investments and highly efficient in its operations.

Fund Raising

On June 30, 2010 the College successfully completed a comprehensive campaign, *The Talents Entrusted to Our Care: The Campaign for Muhlenberg* (TETOC) by raising 5% over the \$105 million goal for a total of \$110.4M. The campaign's success has strengthened the College in a number of ways: unrestricted annual support of The Muhlenberg Fund has increased from \$1.4 million in FY 04 to a high of \$2M in FY 08. Despite the economic collapse in the fall of 2008, The Muhlenberg Fund sustained nearly \$1.9M in both FYs 09 and 10. Endowment increases have been realized through investment strategy and gifts. The College's greatly improved and expanded physical plant have benefited from the philanthropy of our alumni, parents, and friends. Those campaign initiatives not completely funded will continue as priorities during the future.

For the next few years Muhlenberg's fundraising climate will continue to be challenging. Economic recovery to pre-2008 levels is still some ways in the distance, donor apathy is a factor as the College continues to strengthen its development and alumni relations program. Over the next three to five years, many of the College's identified leadership donors will be directing their gifts in fulfillment of pledges made during the now completed TETOC Campaign. As a result, new philanthropic revenue will not be as readily available as in previous years until a new pool of leadership donors is identified and cultivated. The percentage of alumni participation took a severe drop in FY 2008-09 and has stabilized at 25% for the past two years. Increased alumni participation is anticipated through robust and new engagement through volunteer outreach, by strengthening the partnership with the Alumni Board and by the creation of a new undergraduate philanthropy program.

The Development and Alumni Relations Post-Campaign Operational Plan outlines goals, objectives, and strategies designed to build on the philanthropic momentum created by the TETOC Campaign by focusing staff and volunteer efforts on continuing growth in the Muhlenberg Fund and reunion giving, strong stewardship efforts, increasing alumni giving participation, educating students and younger alumni on their lifelong relationship with the College and by further strengthening giving to the Endowment. All initiatives are positioning the College for success in a future campaign by identifying and adding more potential leadership gift level relationships to our donor-pipeline.

X. Risk Assessment and Potential Modifications to the Plan

Risks can be assessed in a matrix format that balances probability with potential impact. At present, the two most likely – and most significant – risks are related to enrollment. These are: (a) price resistance expressed in falling applications and/or yield; and/or (b) a sharp increase in the discount rate.

The continuing demographic decline (see above, pages 8-9), reduced home equity, tight credit markets, stagnant disposable family income, and the economic uncertainty caused by the recessionary economy have combined to make families think longer and harder about the costs and benefits of high priced private higher education. To date, this anxiety has resulted in declining applications and skyrocketing discount rates at a number of institutions.

The effects on Muhlenberg have been comparatively mild to date. After a decline of about 9% in total applications during 2008-2009 (the worst of the recession), applications rebounded by about 3.6% in 2009-2010. We have seen a more significant decline in Early Decision (ED) applications (up 2.6% in 2008-09, but down 10.7% in 2009-2010), reflecting families' fiscal caution. While our yield rate has declined slightly, academic quality has held steady and diversity has increased. Our discount rate has also increased slightly, but is still within budget. Enrollments for the Class of 2014 are slightly above target and summer "melt" has been less than projected.

Muhlenberg's overall strategy – indeed the essence of both this and the previous strategic plan – is to strengthen its value proposition. In other words, we must create both in reality and in public awareness, a liberal arts experience of such high quality that it is perceived as worth the premium price we charge. This strategy has been successful to date, but we must also have the flexibility to respond to sudden challenges posed by endowment performance, enrollment results, interest rates, health benefits costs, fund raising results, or other variables that may require course adjustments in the plan going forward.

Risk abatement steps in the plan include:

- A financial model built on conservative assumptions, with ample built-in contingencies, including \$1.1 million per year in cash contingencies, an additional \$4.7 million in equipment and special projects pools, and an enrollment "cushion" of at least 50 students, created by building the budget on lower than projected actual enrollment. Although a number of initiatives in the plan are expected to reduce operating costs or generate additional revenues, the projected savings and revenues have not been built into the budget model, and will not be until they are realized.
- A flexible plan that calls for new initiatives to be introduced over time and in an order that maximizes opportunities for periodic review. Most initiatives can be curtailed or discontinued if necessary – either because of unforeseen budgetary constraints or because they are not effective in producing the anticipated benefits for the College.

In the previous plan I quoted Publius Syrus, who wrote in 42 B.C.E.: "It is a bad plan that admits of no modifications."¹⁴ This strategic plan, like its predecessor, is a guide post, not a hitching post: it sets compass points to steer our continuing efforts in the face of an uncertain future. We believe it will result, five years hence, in a Muhlenberg College that is stronger, better, and more distinguished in every way.

¹⁴ *Maxims* 429

Appendix 1

Fundamental Institutional Values¹⁵

Revision, March 2010

A Muhlenberg education develops each individual's capacity for a life of leadership and service by challenging and strengthening mind, spirit, character, and community. We believe the College's faculty, students, staff, trustees, and alumni share and contribute to the following values. Accordingly, these values should guide and inform those engaged in the College's strategic planning process as we identify goals, develop strategic initiatives, and set priorities.

I. Commitment to the Life of the Mind

- We believe that liberal education integrates experiences both within and beyond the classroom, and provides students with the passion and tools for self-initiated and self-directed life-long learning.
- Muhlenberg demonstrates an unusually strong dedication to teaching. This is reflected in the faculty's rigorous intellectual standards, pedagogical expertise, and close relationships with students, and in the balance of academic challenge and personal support that we offer our students.
- We value vigorous and open-minded debate within the context of civility.
- We insist upon intellectual integrity and personal accountability.
- We value critical independent thinking and challenge intellectual orthodoxy.
- We believe in the fundamental importance of research and the creation of new knowledge for the intellectual vitality of both faculty and students.
- We believe that the life of the mind embraces both analytical and creative effort.
- We believe that liberal education should nurture both the capacity for independence and the ability to work collaboratively with others.

II. Commitment to Spirit and Character

- We acknowledge the value and power of spiritual life, as well as our individual limitations in achieving absolute understanding of truth. Accordingly, we respect and show active interest in and concern for both our own and other faith traditions, and we respect the views of those who do not identify with any faith.

¹⁵ This document derives from "A Covenant of Values, Principles and Behaviors for a College of Character" developed by the Campus Climate Committee of the Muhlenberg College Board of Trustees (April, 2003), and subsequent suggestions from the President's Staff and the President's Planning Group (October - November 2003).

- We believe that honesty, integrity, and truthfulness should characterize both our public and private behavior, and that the development of ethical standards is an important component of liberal education.
- We value the physical well being of ourselves and others, as well as the important life lessons that can be learned from healthful physical activity.
- We are committed to self-improvement and strive openly and actively for ever higher standards of excellence in all areas of endeavor.
- We realize that pushing ourselves to stretch our personal limits of knowledge and understanding will sometimes result in failure and that failure provides opportunities for personal growth.

III. Commitment to the Life of the Community - On Campus and Beyond

- We treasure a distinctive campus climate characterized by warmth, friendliness, a strong sense of community, and close relationships among students, faculty, and staff.
- We demonstrate mutual respect for differing ideas, perspectives, experiences, and personal identities.
- We strive to function as a caring community, demonstrating concern for and offering support to each other, while challenging each other to excel.
- We reject as unacceptable behavior characterized by violence, malice, disrespect, indecency, or contempt for others.
- We are committed to developing a campus culture in which fairness, equality, human diversity, and justice are successfully integrated with the healthy clash of ideas and beliefs.
- We acknowledge our obligation to be good neighbors and good citizens, particularly in the Lehigh Valley, and to improve the lives of those inside and outside our community who have less access to education and political power, fewer privileges and resources, and who bear the burden of discrimination.
- We are committed to being good citizens of the Earth, and to making institutional decisions that are mindful of our complex relations with the ecosystem

Appendix 2

Participants in the Planning Process

President's Staff

Dr. Randy Helm, President
Rev. Peter Bredlau, College Chaplain
Mr. Michael Bruckner, Vice President for Public Relations
Mr. Ken Butler, Executive Assistant to the President
Mr. Kent Dyer P'07, P'10, Chief Business Officer & Treasurer
Ms. Karen Green, Dean of Students
Mr. Christopher Hooker-Haring '72, P'09, P'10, Dean of Admission & Financial Aid
Ms. Connie Harris, Vice President for Development & Alumni Relations
Dr. John Ramsay P'12 P'14, Provost

Faculty

Dr. Bruce Anderson, Professor and Department Chair, Chemistry
Mr. Amze Emmons, Assistant Professor, Art
Dr. Trevor Knox, Associate Professor, Accounting/Business/Economics
Dr. Elizabeth McCain, Professor, Biology
Dr. Lisa Perfetti, Associate Professor, Languages, Literatures and Cultures
Dr. Stefanie Sinno, Assistant Professor, Psychology

Students

Mr. Adam Bernstein '12 Ms. Laura Eldon '11 Mr. Jordan Sones '10

Staff Associate

Ms. Christine Lake, Assistant to the Director of the Student Union

Management Staff

Ms. Cynthia Amaya '01, Associate Director, Admission & Financial Aid

Service Personnel

Mr. Roberto Rivera, Groundskeeper, Plant Operations

Other Guests/Participants in PPG Meetings

Ms. Julie Ambrose, Director of the Senior Year Experience
Mr. Sam Beidleman '63, Athletics Director
Mr. Aaron Bova '00, Associate Director, Housing Services
Ms. Wendy Cole, Director of the Academic Resource Center
Dr. Brett Fadem, Associate Professor, Physics
Mr. Glenn Gerchman P'14, Director, Student Union & Campus Events
Ms. Beth Halpern, Director, Community Service and Civic Engagement
Dr. Kathy Harring, Associate Dean for Institutional Assessment
Ms. Joyce Hommel, Director of Trexler Library
Mr. Christopher Jachimowicz, Director of Leadership Programs and Greek Life
Ms. Pamela Moschini, Director of Disability Services
Ms. Cailin Pachter, Director of the Career Center
Mr. David Rabold, Capital Projects Manager
Ms. Jan Schumacher, Director, Residential Services
Dr. Carol Shiner Wilson, Dean of the College for Academic Life

Appendix 3

Planning Process Timeline

(Steps involving the Board of Trustees are in **bold**)

July 31, 2009	Process and timeline proposed and comments solicited from Trustees , students, staff, faculty, Parents Council, Alumni Council Executive Committee.
August – September, 2009	Comments on process and on key planning documents (Mission Statement, Planning Guidelines, Institutional Values, etc.) collected from Trustees and other constituencies. President’s Planning Group (PPG) formed.
October – December, 2009	PPG reviews suggested changes to key planning document, conducts environmental scan, SWOT analysis, and benchmarking studies, and proposes vision statement and six strategic goals. PPG reviews suggested initiatives related to faculty development and academic program Trustee Committee on Campus Life reviews StrengthsQuest initiative. Trustee Special Topics Session: Lessons from the Great Recession.
January – February, 2010	PPG reviews benchmark data and initiatives from academic support, student life, student services, facilities, and external relations. Campus Forum Trustee Building & Grounds Committee reviews “Big Uglies” (future construction needs). Trustee Finance and Investment Committee reviews Strategic Planning Budget Model and Debt Policy. Campus Life Committee reviews Living-Learning Communities Religious Life Committee discusses vocation

March – May, 2010	<p>PPG reviews facilities, technology, alternative revenue sources, and initiatives submitted by the community, analyzes cost estimates, and suggests priorities.</p> <p>Parents Council discusses strategic planning goals.</p> <p>Trustee Building & Grounds Committee reviews facilities and technology initiatives.</p> <p>Campus Life Committee reviews student life initiatives</p>
June, 2010	<p>Senior Staff reviews draft planning document</p> <p>Trustee Strategic Planning Retreat broadly endorses draft plan</p>
July – August 2010	<p>President prepares penultimate draft of Strategic Plan.</p>
September, 2010	<p>PPG reviews draft strategic plan</p>
October, 2010	<p>Board of Trustees reviews and, if appropriate, approves strategic plan.</p>