



Susquehanna University: Toward a Sustainable Future

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Susquehanna University: Toward a Sustainable Future

In the spring of 2010, as the global economy remains in its most difficult financial crisis in 80 years, Susquehanna University is a strong and vibrant institution that recently concluded the celebration of its sesquicentennial. While our first century was marked by a pragmatism borne of necessity, in the past 50 years we have witnessed a period of significant growth, development and innovation throughout the institution. Credit for this progress is owed to the extraordinary efforts and generosity of students, faculty, staff, board members, alumni, parents and friends, and to a succession of thoughtful and focused planning activities. We approach this strategic planning process as a fiscally strong institution with momentum, ambition and enthusiasm. Yet it must be acknowledged also that the challenges facing private liberal arts institutions are many. Remaining focused on our mission, guiding values and core strategies, making wise choices and investments and remaining a dynamic and agile institution will be keys to sustaining and increasing our momentum.

The most recent strategic plan, *Susquehanna University: A Plan for Greater Intellectual Engagement and a Stronger University Community* (adopted in 2003) has served us well in providing strong and enduring institutional guidance and has created opportunities for significantly enriching the experiences of our students. In reviewing that plan in 2003, one senior trustee remarked that, more than previous efforts, the plan expressed “timeless” objectives that he could imagine resonating far beyond an incremental planning period of three to five years. It was clear as we began the process of developing this current plan that the 2003 document still resonates with our academic community and that it has retained a currency and vibrancy rare in institutional planning. It should be no surprise then that much of the work we envision for the years ahead rests on the foundations laid during these past six years.

The 2003 plan sought to enhance the student experience, further strengthen the institution and secure the university’s standing as a national model for exemplary undergraduate education. We recommit ourselves to this vision mindful of the global financial crisis. While its full impact cannot be predicted, there seems little doubt that there will be significant consequences for Susquehanna University specifically and for higher education generally. The plan is intended to be both focused and dynamic: allowing us to attend to the university’s priorities during this time while remaining agile enough to adjust to an uncertain future. This approach is in keeping with current perspectives on strategic planning and marks a transition for this institution from “strategic planning” to “strategic thinking.” It is critical that planning become more of a regular activity rather than a discrete episodic event that brings our community together in these kinds of discussions only every five years.

At the plan’s core is the commitment to strengthen those areas of our educational work that reflect our collective values. While it differs from a more typical strategic plan in that it is written for three years as opposed to five (thus reflecting the current difficulty of predicting long-term financial conditions), its new initiatives continue to advance the university during this time of crisis, thus ensuring institutional progress rather than retrenchment. This plan is written with a combination of realism and optimism, reflecting a cognizance that while some challenging times lie ahead, the strength and commitment of the university community will ensure its future

success. It remains our vision that Susquehanna can be a national model for exemplary undergraduate education and that these commitments will further distinguish the university and most importantly the education it provides for its students.

Strengthen Areas of Core Commitment

Our previous strategic plan (approved by the Board of Trustees in 2003) resulted in significant progress in a number of areas identified as essential for advancing our educational mission. While some of those initiatives have been realized and are now fully operational, others require continued or additional attention. Our first area of focus is on the completion and strengthening of that work.

1. Further develop a diverse and inclusive community.

Diversity is a core value of the inclusive excellence we seek and continues to be an educational imperative that remains a central commitment for Susquehanna.

As endorsed by the Board of Trustees in 2007, the Statement on Diversity and Inclusiveness declares Susquehanna University's "commitment to being an engaged, culturally inclusive campus. [This] entails understanding how ... differences impact the ways in which we experience the world, the beliefs that emerge from and frame those experiences, and the impact of power and privilege on our lives. Such engagement takes account of the lived realities of students and is essential for effective teaching and learning, equitable governance and decision making, and healthy community life."

Diversity reflects the range of individual experiences, ideals and interpretations of the world that emerge from differences in cultural traditions and backgrounds. These differences embrace gender, race and ethnicity, religion, language, abilities, sexual orientation and gender identity, socioeconomic status and more.

While we continue to seek to diversify our community in the ways previously outlined, increasing representational diversity in the student body, faculty, administration and staff remains a focal point toward achieving the level of visible and invisible diversity necessary for institutional transformation to occur. This critical mass is necessary to elicit the educational benefits of diversity that will ultimately enrich all in our community.

A significant amount of attention and energy will be directed toward the completion of the implementation of the "Connections" section of the Central Curriculum (with its diversity and cross-cultural requirements) to give all students the theoretical, experiential and reflective tools to build more inclusive communities. In addition, faculty and staff development opportunities on issues of diversity and inclusiveness will be implemented and integrated into regular cycles of orientation, training and evaluation.

The special assistant to the president for diversity and inclusion/chief diversity officer (CDO) will support the creation of robust networks for diversity and inclusion across

academic and administrative units. In collaboration with senior staff, the CDO will implement policies and procedures to make us a more inclusive community, noting that building understanding, promoting dialogue and creating support systems are areas of focus for us all. Progress will require collaboration and partnership among students, faculty and staff and will undoubtedly come with challenges that test the strength of our community. It is probable that acts of intolerance such as racism, homophobia and other forms of bias will occur. We will seek to be better prepared to respond to these incidents, to learn from them and to grow as a community through them.

Outcomes

- The university operates through a working model for diversity that is sustainable and that enables the capacity of the Susquehanna community.
- The provost, vice president for student affairs/dean of students and the chief diversity officer have increased informal and formal connections between departments such as the Centers for Civic Engagement and Diversity and Social Justice, the Offices of Cross-Cultural and Off-Campus Study, First-Year Programs, the library and others that can support cross-cultural learning.
- Communications about our commitment to diversity and our expectation for outcomes at every level of the university are clear, direct and transparent.
- The academic performance, retention and persistence to graduation for Susquehanna's students of color are comparable to those of majority students.
- The enrollment of community college transfers, international students and military veterans has increased, with academic performance, retention and persistence to graduation comparable to those of traditional-aged students.
- Students acquire cross-cultural competency through the "Connections" section of the curriculum.
- The affirmative action search process for administrators and staff is clear and rigorous and results in more diverse applicant pools for open positions.
- Benchmarks for representational diversity in our students, faculty and staff have been reached.

Actions

- The senior staff will create accountability measures for diversity outcomes via divisional and departmental Diversity Action Plans.
- The vice presidents for finance, student life and university relations, in collaboration with the chief diversity officer, will work to identify and increase resources and support for co-curricular diversity and inclusion initiatives that encourage intentional opportunities for cross-cultural dialogue and experiential learning outside of the classroom.
- The chief diversity officer, with the Diversity Advisory Board and the director of institutional research and assessment, will lead a group charged to conduct an institutional assessment and diversity assets audit.
- The vice president for enrollment management and the chief diversity officer will collaborate on developing and executing strategies for building relationships with

community colleges to create pathways for academically qualified students to transfer to Susquehanna to complete their bachelor's degrees and providing appropriate support systems for those students upon their enrollment.

- The vice president for enrollment management, the chief diversity officer and the vice president for student life/dean of students will collaborate on developing and executing strategies for comprehensive admissions programs for international students and military veterans and providing appropriate support systems for those students upon their enrollment.
- The provost, vice president for enrollment management, the chief diversity officer and the vice president for student life/dean of students will work with the director of the Center for Academic Achievement and the director of First-Year Programs to align efforts to increase the academic performance, retention and persistence of students of color.
- The faculty, working with the deans, the provost and the director of cross-cultural and off-campus programs, will fully implement the "Connections" section of the Central Curriculum.
- The chief diversity officer, acting as the affirmative action officer, will collaborate with hiring managers to develop diverse pools and provide Susquehanna the opportunity to hire qualified candidates from protected groups.

Benchmarks

- Responses to student satisfaction surveys report a more positive campus climate for all students, and students of color in particular.
- The Bias Response and Education Team (BRET) is increasingly used by the campus community to report incidents of bias and is simultaneously effective in its response, including documented resolution of reported incidents.
- The academic performance, retention and persistence of students of color, community college transfers and military veterans are comparable to those of majority students.
- Students demonstrate their cross-cultural competency through appropriate ongoing assessment of the "Connections" section of the Central Curriculum.
- The diversity of the American minority faculty is maintained at the fall 2009 level of 17.3 percent.
- By fall 2013, the Susquehanna community is more diverse and inclusive, as follows:
 - Students from 8.9 percent American minority in fall 2009 to at least 11 percent
 - Administrators from 7.2 percent American minority in fall 2009 to at least 10 percent
 - Hourly staff from 5.0 percent American minority in fall 2009 to at least 6 percent
 - International students from 1.8 percent in fall 2009 to at least 3 percent
 - Transfer students, particularly those from community colleges, from 6 percent in fall 2009 to at least 10 percent

2. Complete the implementation of the Central Curriculum.

The Class of 2013 (entering in the fall of 2009) is the first to study under the requirements of the new Central Curriculum. Consequently, new courses must be developed, staffed and assessed to cover requirements, particularly in those areas that expand beyond the old Core, namely, language, diversity, ethics, interdisciplinary, cross-cultural and team and oral intensives. Success will depend on redeploying existing resources and deploying new resources to provide appropriate cross-crediting opportunities to maximize faculty and student flexibility. The Committee on the Central Curriculum will provide development opportunities for both content and pedagogy in all Central Curriculum courses and will develop tools for assessment of the Central Curriculum.

A major piece of the new curriculum is the requirement for a cross-cultural experience followed by a reflective course. High-quality, cost-effective opportunities to satisfy this requirement will be developed that increase both short and semester-long experiences provided by Susquehanna faculty and staff, and by exchange and consortial collaborations. For financial reasons, we must decrease our dependence on third-party study-away providers and create an adequate administrative structure to effectively manage this program within the boundaries of larger budget constraints.

Segments of this new and ambitious curriculum will impact faculty and staff workloads significantly, and mechanisms will be developed to support that work.

Outcomes

- Our students, starting with the Class of 2013, complete their course of study in the Central Curriculum without delays or inappropriate exemptions.
- Our students, starting with the Class of 2013, achieve the learning goals set out in the Central Curriculum, as well as the University Learning Goals.
- The Central Curriculum is a significant attraction to prospective students and faculty.
- The Central Curriculum is recognized as exemplary by higher education organizations and peer institutions.

Actions

- The faculty, department heads, deans, and provost continue to work with the Curriculum Committee to create the array of courses necessary to populate the Central Curriculum, with particular emphasis on those areas not yet fully developed: interdisciplinary, intensives and cross-cultural.
- The department heads and deans will ensure that students in every major have a clear road map for meeting the Central Curriculum requirements.
- The provost, deans and department heads continue to implement faculty workload arrangements for short-term GO programs and interdisciplinary courses, and additional faculty lines are allocated in support of these and other Central Curriculum needs.

- The Committee on the Central Curriculum works with faculty to implement an ongoing assessment program for the Central Curriculum.
- The Committee on the Central Curriculum, working with the Center for Teaching and Learning, provides ongoing, appropriate faculty development opportunities connected to Central Curriculum content and pedagogy.
- The provost, the director of off-campus and cross-cultural programs and the vice president for finance work with faculty and staff to create an adequate infrastructure and program costs for the GO program within appropriate budgetary boundaries.
- The provost and the vice president for university relations work to raise resources for off-campus and cross-cultural study through giving and grants.
- The provost and deans support their own and faculty and staff's dissemination of Central Curriculum successes in appropriate conference presentations and other publications.
- The provost and the associate vice president for communications publicize the Central Curriculum and its distinctive attributes.

Benchmark

- Our students demonstrate their achievement of the Central Curriculum learning goals through appropriate ongoing assessments.

3. Sustain support for faculty scholarship and collaboration with students.

Susquehanna University is an institution that values substantive, collaborative scholarship between faculty and students. Even with significant losses from the endowment, we will seek to preserve funding for these valuable experiences. Over the next three years, developing additional mechanisms to assist with collaborative and independent scholarship will be an institutional priority. We acknowledge that sabbatical leaves remain an important tool to support faculty scholarship and regeneration, and that they have continuing benefits for the university community as a whole. We commit to developing within the faculty an even greater level of accountability and transparency in the availability and administration of resources to support student/faculty-staff collaboration with the aim of utilizing them as effectively and equitably as possible. Because we retain a commitment to substantive interaction with students and because we believe that sustained and significant scholarship is possible at the present level of faculty teaching loads, changes in these loads are not envisaged. Rather, we will continue to recognize and reward a broad spectrum of faculty scholarship and creative activity and, where feasible, give priority to collaborative work with students.

Outcomes

- Our academic departments and programs, based on a review of current opportunities for student/faculty-staff collaboration in their curricula, have proposed or implemented additional opportunities in this area, as appropriate.

- Our campus recognizes and celebrates student/faculty-staff collaboration through increased participation in and attendance at scholarly and creative campus events and in other ways that demonstrate the value that we as a community place on it.
- A significant proportion of our faculty members are engaged in scholarship and creative activity and also collectively produce significant scholarship and creative works. Such work enjoys recognition and prominence in campus culture, and a significant portion of it is nationally recognized by the respective disciplines and professional organizations to which faculty belong through its publication in peer-reviewed outlets and performance in respected venues.
- Adequate internal and external resources are devoted to supporting faculty scholarship and creative activity.

Actions

- The provost, working with the academic deans and faculty, maintain and, as necessary, enhance structures to support undergraduate research, scholarship and creative activity. These structures must include effective consideration of ways in which these activities are related to faculty teaching, scholarly/creative and service/citizenship expectations and evaluations.
- The provost and academic deans work with the expanded Office of Foundation and Government Relations to enhance support for grant seeking and grant writing by individuals, collaborative groups and the institution.
- The provost, working with the Division of University Relations and the Faculty Scholarship Committee, sustains funding to support faculty research, including providing some targeted opportunities for collaborative and interdisciplinary work. Such funding would continue to be distributed on a competitive basis but would expand proportionally with the expansion of the faculty.

Benchmarks

- Maintain, proportional to growth, the level and quality of faculty scholarly and creative activity.
- Maintain, proportional to growth, student presentations at national and regional conferences and number and quality of student/faculty-staff publications.
- Maintain, proportional to growth, the level and quality of library resources and services supporting faculty and student scholarly and creative activity.
- Increase the number of external grant applications submitted.

4. Complete the assessment infrastructure.

Susquehanna University has made great strides toward establishing an infrastructure to support the assessment of student learning and of institutional effectiveness. The centralized approach provided by the Office of Institutional Research and Assessment has prepared us for this long-term continual process. Our priorities for this strategic plan include seeking more effective strategies for using and communicating assessment data and more cogently telling the Susquehanna story, particularly as it relates to outcomes. First, we

will enhance student learning assessment by combining the student learning assessment efforts of academic and administrative departments to allow us to better convey the seamlessness of a Susquehanna University education and to create important linkages across the university's divisions. Given the importance of the Central Curriculum in the future of the university, specific ongoing assessment tools will be created in this area as well. Second, and equally important, we will evaluate institutional effectiveness—the extent to which we achieve our institutional goals. Certainly, this strategic plan sets out goals for the next three years, and the successful achievement of the defined benchmarks is an indicator of institutional effectiveness. In addition, longitudinal assessments of retention, graduation rates, student and faculty/staff satisfaction, the range of financial ratios and other variables will be regularly tracked in an inclusive program of assessing institutional effectiveness. Furthermore, mechanisms for benchmarking and competitive assessment for continual improvement in our administrative processes will be developed to complement the Key Performance Indicators, which will be evaluated and modified as appropriate given this strategic plan. In the years that precede our decennial Middle States self-study, and as a matter of best practice, assessment will become more central to our daily work and to our ability to connect with our external constituencies.

Outcomes

- Assessments for each learning goal in all areas of the Central Curriculum are identified.
- Assessment data are used to make improvements related to each of the expressed learning goals for all majors and minors without corresponding majors.
- A communications plan regarding the assessment of student learning and institutional effectiveness is implemented.

Actions

- Our faculty establishes a steering committee for each area of the Central Curriculum. All faculty involved with each area of the Central Curriculum are involved in the assessment process.
- The senior staff and deans, with the director of institutional research and assessment, will work with each academic and administrative department and program to design and implement an assessment program for institutional effectiveness.
- The senior staff will develop and communicate an institutional policy regarding the public sharing of student learning and institutional effectiveness data.
- The director of institutional research and assessment will draft and distribute to the community a biennial report compiling information on student learning assessment, with a focus on the University Learning Goals and on institutional effectiveness.
- The director of institutional research and assessment will propose an annual survey schedule that is approved by the senior staff.

- The senior staff and the director of institutional research and assessment will establish guidelines for and begin the implementation of a decennial review process for administrative departments.

Benchmarks

- Annual department reports for both academic and administrative departments reflect the results of their student learning and institutional effectiveness assessment activities and the changes that have resulted from them.
- Susquehanna's 2014 Middle States decennial review affirms our work in the assessment of student learning and institutional effectiveness.

Advance the Future Success of the University

Given our institutional strengths, the development of strategies to enable us to adjust to, and even benefit from, changing economic realities can move the university toward the achievement of our vision, mission, core strategies and guiding values (Appendix A). The areas of focus in this section of the strategic plan include sustainability, the effective communication of outcomes and the engagement of an active alumni community.

5. Integrate sustainability into the curriculum, physical plant and daily practices.

Consideration of resources and environmental impacts must become an integral part of Susquehanna's operations. The responsible stewardship of the planet is an ethical issue (as outlined in our University Learning Goals) and one that is of great interest to our students, faculty and staff. While there are day-to-day modifications that can be made, the development of the cross-cultural requirement in the Central Curriculum raises the matter of the environmental impact of extensive global travel. Programs will be required to develop these initiatives in environmentally and fiscally responsible ways.

The Campus Sustainability Committee will be closely involved in the implementation of new policies and practices that address the imperative to "green" our day-to-day operations. While all have a role in the "greening" of our work, we will look to the chief information officer, the director of facilities management, the vice president for finance and the Campus Sustainability Committee for the identification of strategies. Importantly, though we will be mindful of the limits of our human resources and will strive to minimize rather than redistribute the burdens of administration within the university.

Outcomes

- Our students will have appropriate curricular and co-curricular learning opportunities to explore the theoretical, ethical and practical dimensions of sustainability and sustainable living both for individuals and for local, national and global communities.
- Our day-to-day operations and practices reflect our commitment to sustainability.

- The Center for Environmental Education and Research (CEER) at Yoder Farm enhances and integrates curricular, co-curricular, service, community and research activities to promote sustainability in an outdoor laboratory and classroom environment.

Actions

- The Campus Sustainability Committee will engage the campus community in transforming Susquehanna into a more sustainable endeavor.
- The director of facilities management will lead an investigation of alternative fuels to power the steam plant or technologies to harvest carbon and other pollutants from the stack gases, which should significantly reduce carbon emissions.
- The director of facilities management will lead an exploration of cogeneration of electricity, which should also significantly reduce our carbon emissions if we generate power on campus and harness the waste heat.
- The Facilities Management Department and the vice president for finance will continue to develop and maintain capital projects that conform to LEED certification and will continue to commit to utilizing existing and new technologies to maximize energy efficiency (for example, the upgraded heat plant, geothermal, wind and solar power).
- Our faculty and staff, supported by the provost, deans and the CEER, will integrate the study of sustainability into existing curricular and co-curricular programs and create new curricular and co-curricular learning opportunities that promote sustainability and environmental education, research, service learning and co-curricular activities.
- The vice president for finance and the chief information officer will collaborate to develop and implement more efficient working practices that minimize paper and other supply usage.
- The faculty in the sciences will collaborate with local farmers to promote sustainable agriculture practices.
- The faculty and the staff of the Division of Student Life will increase the number and scope of service learning experiences, community gardening, research and formal class and laboratory activities that promote and emphasize sustainability.
- The faculty will establish community-supported agriculture for Susquehanna.

Benchmarks

- A defined plan is in place to reduce the amount of Susquehanna's carbon emissions as measured in an annually updated inventory of greenhouse gases.
- The number and quality of green initiatives, as measured using the survey tool provided by the College Sustainability Report Card, significantly increase.
- Students will demonstrate their achievement of learning goals in the area through appropriate ongoing assessment.
- Future new construction receives LEED certification.
- An increased number of formal classes use the CEER.

- An increased number of service-learning projects and community outreach activities within the outdoor learning environments are provided by the CEER.
- An increased number of faculty-student scholarly projects examine sustainability problems.

6. Measure and communicate student outcomes.

The current economic crisis has increased the emphasis that prospective students and their parents place on demonstrated graduate outcomes. Extensive national research confirms that they are using cost-benefit calculations on the perceived utility of a college education in reaching their decisions. They understand that a quality undergraduate education can lead to both better employment opportunities and admission to stronger graduate and professional programs. It is imperative that we demonstrate the university's value proposition by conveying both the strength of our academic programs and the successes of our recent graduates. By linking specific educational experiences to desired outcomes, we will emphasize the real-world benefits of a Susquehanna University education. Practically, this includes correlating student-learning outcomes with the skills sought by employers, including the relevance of experiential learning opportunities, like the GO program, internships and research opportunities, as well as highlighting the job and graduate school placements of recent graduates. We will also seek additional opportunities to enhance postgraduate opportunities for our students, for example, strengthening our efforts to encourage and support our strongest students in pursuing prestigious postgraduate awards and fellowships.

More effective and broad communication of the university's special attributes around the themes of academic excellence, a total collegiate experience and demonstrated outcomes will give substance and validity to our value proposition; however, substantial work remains to collect the "evidence," both qualitative and quantitative, that will lend validity and voice to these themes.

Outcomes

- A full-service career support program is in place that provides centralized access to internships, mentoring, career development and placement services for students, alumni and parent volunteers and employers.
- A coordinated program of leadership development is in place that provides opportunities for all students to realize their potential and identifies and prepares them for desirable job placements, admission to excellent graduate and professional programs and to compete favorably for prestigious postgraduate awards and fellowships.
- Members of the campus community speak knowledgeably and consistently about our institutional story, using messages that are tailored appropriately for various audiences, conveying how a Susquehanna education has proven to be excellent preparation for life and careers.

Actions

- The president convenes three cross-disciplinary, cross-unit teams of faculty and staff, with appropriate funding and support, to recommend a coordinated approach to postgraduate success for all students. These cross-unit teams will be charged to do the following:
 - Benchmark Susquehanna's commitment to postgraduate success against best practices, concluding with recommendations to implement programs, incentives, staffing and structures to enhance Susquehanna's reputation for demonstrated successful student outcomes.
 - Implement a coordinated approach to student leadership development; revise the student employment program to make all campus work a professional experience; expand the University Assistantship program.
 - Develop a comprehensive communications plan, based on internal and external research, that "connects the dots" for students and their families by linking a Susquehanna education, the liberal arts and our learning goals to the knowledge and skills required for success in life and career; establish a central repository of information on students and alumni to which all faculty/staff can contribute and that is available for all faculty/staff to see; define "Key Success Indicators" that are meaningful to students, their families and faculty and staff.

Benchmarks

- Alumni data reflect high levels of satisfaction and endorsement about how their education prepared them to achieve, lead and serve.
- Student surveys reflect an understanding that a rigorous education, grounded in the liberal arts and guided by learning goals, is excellent preparation for life and careers.
- Alumni secure desirable employment or enroll in graduate and professional programs at well-regarded institutions.
- More graduates secure prestigious fellowships and awards.

7. Cultivate lifelong connections with students.

Susquehanna University's continued success will depend heavily on our ability to engage alumni as active members of our community. Alumni can play vital roles in recruiting students, assisting them and each other through alumni career networking, serving as champions in institutional reputation building and providing significant financial support through philanthropy. Years of national research have demonstrated that volunteerism and philanthropy go hand-in-hand.

Anecdotal and quantitative evidence affirms the deep affection that the majority of our alumni hold for their alma mater; however, that affection has not translated into the high rates of alumni gift giving and volunteerism that distinguish the strongest liberal arts colleges. Such activities are learned behaviors, and we will work to demonstrate for our

students the benefits of lifelong engagement with Susquehanna. Just as the community has come to appreciate that student recruitment is everyone's responsibility, so too must we learn to work together to foster a "culture of giving" in our students. We hope to instill in students, even as they are making their college choice, the message that their relationship with Susquehanna University is one that lasts a lifetime. More vigorous and sustained collaborative partnerships will be developed among faculty and staff to create the appropriate learning environment and the cross-unit structures required to support multipurpose alumni networks.

While outcomes such as alumni giving patterns will be easily measurable, others will require the development of ongoing assessment tools to gauge the satisfaction of alumni and their impact on areas such as student recruitment, reputation building and career support.

Outcomes

- Our students and alumni understand the value of their lifetime connection to Susquehanna.
- Our faculty and staff are actively involved in developing and maintaining institutional relationships with alumni.
- Our alumni network is a strong tool that is perceived as advantageous to prospective students, their families, current students and alumni, as well as to the university.
- The relationship between Susquehanna and our alumni is perceived as mutually beneficial, with significant interplay between our alumni and the university.
- The positive feelings our alumni have about their time at Susquehanna and their belief in the strength and future of the university translate to greater involvement in student recruitment, networking/career/professional activities and giving.

Actions

- The vice president for university relations and the director of alumni relations will establish a mechanism for ongoing dialogue with faculty and staff colleagues. Key dialogue partners include the academic deans, the Division of Student Life, the Department of Athletics and the Offices of Admissions and Financial Aid.
- Staff in alumni relations and advancement services, in partnership with the Offices of Information Technology and University Communications, and the Alumni Board, will continue to develop SUBridge as the electronic toolkit and gateway that serves the Susquehanna community by linking students, faculty, staff and alumni to each other.
- The staff in alumni relations and the Susquehanna University Fund (SUF) will establish a student "workforce" that can be productively engaged in alumni-focused work, including SUBridge, Facebook, regional chapters, campus events and the SUF.

- The director of alumni relations will create regular and meaningful connection opportunities to bring into dialogue current students, the Alumni Board and the faculty.
- The staff in alumni relations will continue to develop regional chapter organizations and frame activities around strengthening the alumni network. Working with the academic deans, department heads, the Division of Student Life, the Office of Admissions, and the Department of Athletics, the alumni relations and development office staffs will increase annually the number of alumni who visit campus, who have meaningful connections with current students and who participate in student recruitment.
- The university relations staff will lead a cross-functional effort to develop a data-driven, alumni profile measuring engagement—beginning with enrollment, building during the undergraduate years and extending beyond graduation. This becomes a primary tool for developing, at a minimum, alumni and fund-raising activities and programs.
- The library will continue to expand the digital project of archival images related to SU history, publicize the collection to alumni and explore other collaborations with alumni relations staff.

Benchmarks

- Registration on SUBridge grows to 60 percent of all alumni (~9,000) and 75 percent of all graduating seniors.
- Campus-based activities bring increasing numbers of alumni back to SU to (1) connect with students in ways that add value to the undergraduate experience; (2) connect to and serve as resources for faculty and/or staff members; and (3) connect to each other.
- Regional chapter activities align with alumni engagement objectives in the areas of student recruitment, career development and increased professional and social networking.
- Alumni giving increases to at least 26 percent by June 30, 2013.

Requirements

Susquehanna is a financially strong institution. While many colleges and universities have been forced into a defensive position in responding to the economic downturn, Susquehanna's fiscal discipline has created the financial capacity to balance "offense and defense" in our planning. The "offense" resides in the seven strategies outlined above; their successful realization will advance the institution, and we must be sure that our commitments are matched by our resources. Effective "defense" requires us to make prudent choices in providing those resources through revenue enhancement, resource deployment and cost management.

Our Current Financial Condition.

Susquehanna has not been immune to the global financial crisis. The market value of our endowment declined by 27 percent from its peak of \$125 million in December 2007 to \$91.5 million in December 2009. At one point it was as low as \$66 million. Also, this unusually long period of very low interest rates has significantly reduced the amount of interest income that flowed into the operating budget: in just three years, between 2007 and 2009, interest income declined from \$3,139,486 to \$399,133 on a \$65 million operating budget.

In response, we reduced operating expenses by approximately \$1 million in 2008–09. In line with our commitment to academic excellence, administrative budgets were reduced by about 10 percent, while academic budgets experienced a more modest 5 percent reduction. We were able to avoid the more painful cuts experienced at many other institutions, in part because we were not as dependent on endowment income, but also because we met enrollment and financial aid goals. Meeting those targets has allowed us to add the faculty and staff necessary to implement the new Central Curriculum.

What differentiates Susquehanna from many institutions is its history of positive bottom lines. While annual operating margins have been modest, over 25-plus years they have accumulated to build significant reserves, which now total about \$50 million. This is the equivalent of almost 10 months' worth of operating expenses invested in readily available bank cash and treasury bills, giving Susquehanna extraordinary and valuable flexibility. Our cash reserves allow us to act from a position of strength as we consider the challenges posed—both known and unknown—in the coming years.

Our reserves have also allowed us to adopt a cash preservation strategy that takes advantage of low tax-exempt borrowing rates to finance capital projects rather than expend reserves. This strategy assumes that we will not spend down reserves but will invest them to earn interest that flows into the operating budget. In most years, that strategy produced significant interest to fund operations; in the current environment, with its unusually long period of low interest rates, interest earned has been minimal.

A marker of our financial strength is our A2 Moody's bond rating, which is an important quality indicator to external audiences. Our current long-term debt stands at \$74 million; since 2006 we have borrowed \$48 million. It is not likely that we could assume additional long-term debt and maintain our A2 rating.

Because of its strong short-term cash position, Susquehanna has the ability to assume an even longer-term horizon for the endowment and take on a higher level of risk. The endowment's asset allocation invests 88 percent in equities and 12 percent in real estate. While this allocation caused outsized volatility over the past 18 months, we are confident that it will allow us to achieve better-than-average returns over the long run and provide superior future funding to the university.

The financial modeling we regularly undertake to assess our ability to underwrite our vision for the future assumes that the elements that contributed to our current strong financial position

will be essential going forward. By fall 2013, we anticipate modest enrollment growth that will produce 2,400 full-time undergraduates (compared to 2,195 in fall 2009); operating results that contribute to reserves; the preservation of reserves in light of additional debt taken on during the past five years; and no additional borrowing for the next three years. In our budgeting, we will continue to be guided by similar financial assumptions as in the previous strategic plan: in each year, the cash operating margin will be positive; over the five-year period ending with 2013, the financial statement operating margin should average greater than zero.

Our five-year financial plan (Appendix C) has been adjusted to reflect lower endowment income and investment income as well as lower annual fund contributions and state grants. We have also reduced our expectation of future increases in the comprehensive fee from an annual 5 percent increase to an annual 4 percent increase. Partially as a result of these reductions, financial statement deficits are currently projected in several of the five years of the multiyear plan; however, operations still yield positive cash in all years.

Although the five-year financial plan has significant embedded risk, given its assumptions that we will achieve enrollment growth and maintain current levels of financial aid, our conservative financial posture, with only a minimal exposure to variable-rate debt, no interest-rate swaps, no investments in hedge funds and a minor investment in private equity, positions us well to manage this unpredictable economic climate. As conditions improve, we will be eager to reinvest in our operations.

In the most basic sense, we are in good financial condition because we have been prudent, and we will continue to be.

Investing in people.

As noted in our last strategic planning effort, people are our greatest asset. The commitments we made then to professional development and enrichment opportunities, adequate staffing and compensation levels, and the nurturing of connections within our growing community will continue to guide us through the time frame for this plan, and beyond.

We continue to believe that high-quality student learning requires a full-time faculty and staff base. When faced with difficult resource decisions, we will be guided by our commitments to maintaining appropriate staffing levels, maintaining the 13:1 student-to-faculty ratio, providing competitive compensation and funding professional development opportunities for faculty and staff. Our financial modeling has included additions of full-time faculty and staff to support our strategic initiatives.

Since the strategic plan was approved in 2003, the university has become a larger and more complex learning organization. Growing complexity makes communications all the more challenging. A new intranet, supplemented by traditional communication vehicles like newsletters and e-mail, will increase our effectiveness. The addition of more electronic communication tools does not replace our efforts to gather as a community as we seek to provide greater capacity and opportunity for two-way communication, access to information and resources, and engagement in decision making.

The following actions will form the foundation of our commitment:

- Use the 25/5 comparison group developed in 2008–09 to benchmark faculty and salaried staff compensation and use regional employer surveys for hourly staff. For faculty, continue to monitor and address impact of AACSB accreditation on business and non-business faculty compensation.
- Benchmark administrative staffing levels using the 25/5 comparison group.
- Launch cycle of external evaluation of administrative units.
- Extend the leadership development program to successive administrative levels.
- Complete and launch the online human resources policy manual to reflect best practices in human resource management.
- Include a faculty/staff satisfaction survey in the Institutional Research (IR) survey cycle.
- Finalize policies regarding internal dissemination of IR data.
- Launch campus intranet to serve as a single entry portal to enhance internal communications.

Maintain and develop facilities and infrastructure as institutional assets.

Susquehanna University's campus is uniformly regarded as a significant competitive advantage, and maintaining its quality and functionality is essential. Since 2003, a total of \$73 million has been spent on capital projects, funded by a combination of reserves, fund raising and long-term debt. Additional projects either underway or contemplated over the next five years (totaling more than \$20 million) remain in the capital investment plan. More than half of this amount represents the renovation of Fisher Hall; other major projects under active consideration include the renovation of the former Catholic church in partnership with Geisinger to include a new student health center, and an initiative to build additional space for admissions and financial aid. Limited remaining debt capacity constrains our ability to address the possible need for additional dining space and student housing via major new construction; ascertaining those needs requires us to refine our understanding of whether students will choose to “go long” (i.e., for a full semester) or “go short” on programs as short as two weeks.

As noted in Initiative #5, our ethical and practical commitment to sustainability requires that we pursue options for reducing our carbon footprint. We will undertake needed health and safety and infrastructure improvements and avoid increasing levels of deferred maintenance. We will remain open to opportunities to make strategic property acquisitions for the long-term benefit of the institution.

Equally important to maintaining a functional and aesthetically pleasing campus is preserving a state-of-the-art technology infrastructure. With the accelerating pace of technology innovation, we rely on the expertise of our information technology staff to recommend system upgrades and new product acquisition where technology is the stimulating enabler for our university strategy and tactical initiatives.

Other specific actions include:

- Completing the building audit and developing action plans to address deferred maintenance issues.
- Completing a new campus master plan to provide a vision for the continuing physical development of the campus, with supplemental student housing and landscaping plans.
- Updating the capital investment plan.
- Completing the conversion to Colleague Advancement and reinforcing the notion that data is a shared institutional resource.
- Continuing to make investments in our highly enabling campus network.
- Continuing to embrace cloud computing and the integration of hosted services through federated authentication and increased broadband provisioning.
- Advancing both internal and external university communications by providing a new single sign-on Susquehanna intranet.
- Pursuing greening through thoughtful technology use with new systems to manage paper consumption.

Recruitment and Retention

As a tuition-dependent institution, maintaining financial equilibrium is significantly dependent upon continuation of desired enrollments and managing our financial aid resources. We expect to undertake important efforts to ensure the desired enrollments in the coming years that are essential to providing a revenue stream to provide resources to achieve our goals. Concentrated efforts in the area of recruitment include the following:

- Continuing efforts begun over the past three years to target particular geographic markets where we can strengthen our market position.
- Increasing enrollment of international students, community college transfers and military veterans.
- Building a program of recruitment and support for international students, community college transfers and military veterans.

Additionally, retention must become a greater focus for us in the coming years. This has been and continues to be one of Susquehanna's strengths; but our performance over the past four years has been mixed with more declines than gains. Under the leadership of the vice president for enrollment management, studying and understanding this trend and aggressively creating policy and programming interventions to strengthen cohort retention and persistence to graduation in the years ahead will be critical for us, especially as we recruit larger populations of international, transfer and military veteran students who will require special support systems. Increasing persistence by 1 percent in each of the next three years is an important and worthy goal for Susquehanna.

Final Note

While we are living in a period of great uncertainty and ambiguity, one thing remains clear: Susquehanna is an institution with great momentum, proudly pursuing its very bright future; the collective work of our trustees, faculty, staff, students and parents to convey to those within and outside of the Selinsgrove community the value of a liberal arts education—and a Susquehanna education, in particular—will allow us to continue to prosper in these challenging times. We are partners in this effort, and our collective efforts will reap benefits long into the future.

Appendix A.

Vision, Mission and Guiding Values

Vision

To secure the university's standing as a national model for exemplary undergraduate education

Mission

Susquehanna University educates undergraduate students for productive, creative and reflective lives of achievement leadership, and service in a diverse and interconnected world.

Guiding Values

Susquehanna University is

- A selective, residential, national liberal arts college focused on an undergraduate education integrating the liberal arts and preparation for professions and careers.
- A learning community that values diversity; intellectual collaboration among faculty and students; scholarship and research; health in mind, body and spirit; and learning in and out of the classroom.
- A working community that recognizes its faculty and staff as its greatest resource, values cooperation, and expects ethical behavior and mutual respect from all its members.
- A responsible community committed to financial stability, good stewardship and a pragmatic and ambitious approach to its work.
- A valuable resource serving the local community and region, while engaging in the larger world through strong urban and international connections.
- A physically attractive setting for reflection and learning.
- A community that expresses its Lutheran heritage through the free and open exploration of ideas, commitment to service, development of individual talents and the welcoming of individuals of all backgrounds and beliefs.

Appendix B.

SWOT Analysis (March 2009)

STRENGTHS

- Clear mission: Undergraduate education
- High retention/graduation rate
- Commitment to student learning and integration of curricular and cocurricular programs
- Central Curriculum/cross-cultural initiative
- Curricular mix of liberal arts and professional programs
- AACSB-accredited Sigmund Weis School of Business
- Active & Collaborative Learning (NSSE)
- Emphasis on assessment
- Joint student/faculty attendance at professional conferences
- Outcomes are strong:
 - High placement rate for employment
 - High placement rate for graduate school
- Well-funded professional development
- Membership in academically centered athletic conferences (Landmark and Centennial)
- Welcoming community
- Beautiful campus and outstanding residence halls
- Campus goodwill and commitment to new strategic initiatives
- Board leadership
- High level of cash on hand
- Conservative debt structure

WEAKNESSES

- Perceived geographical isolation
- Academic profile and size of applicant pool
- High student-faculty ratio
- Lack of diversity of student body and staff
- Student engagement in enriching educational experiences (NSSE)
- Lack of student outcomes data
- Underfunded career services function
- Small numbers of alumni
- Percentage of alumni who give to SU
- Total annual giving
- Size of endowment/high tuition dependence
- Ability to fund capital needs
- Pressure on operating margin:
 - Strategic initiatives add operating costs
 - \$75M+ capital investments increase debt service and depreciation
 - Modest enrollment growth replaces past decade of significant growth
- Leveraged financial statement
 - Relatively significant amount of debt
 - Little capacity for additional debt at our credit rating

OPPORTUNITIES

- College degree increasingly necessary in job markets
- Ability to hire outstanding faculty in a down market
- Focus on sustainability and environmental consciousness
- Emphasis on assessment as opportunity to demonstrate value added
- Interest in research on student learning and its impact on the educational environment
- Business survey course for liberal arts majors
- Athletics recruitment and reputation
- Small college aura/safety of campus
- Some competitors are gutting program to balance budgets
- Our price point is moderate “Goldilocks pricing”
- Potential for government funding
- Electronic communications offer increasingly effective and efficient ways of communicating with primary audiences

THREATS

- International/national economic crisis
 - Tightened credit market
 - Increasing price sensitivity
- Increasing competition for fewer philanthropic dollars
- Price ceilings
 - Decreasing wealth, stagnant salaries, lack of inflation/deflation
- Access: inability of students and families to pay
- Increasing student debt loads
- Tumult in the student loan market
- Declining federal/state educational support
- Fierce admissions competition from stronger, wealthier set of competitors, in addition to traditional competitors
- Increasing student interest in large, urban universities
- Lack of public appreciation for the liberal arts; students and families focused on career preparation
- Reputational decline due to perceived sense of pricing arrogance
- Projected decline in northeastern demographics
- Demographic growth mostly in areas and populations that are not our recruiting strengths