

Strategic Planning Document
Stonehill College

Strategic Planning Committee
April 2001 (revised November 2001)

Contents

<u>Section</u>		<u>Page Number</u>
I	Introduction	1
II	Mission	2
III	Objectives, Key Initiatives	3
IV	Financial Plan	7
V	Areas for Further Study	13
VI	Implementation	14
VII	Divisional Plans	
	• Academic	15
	• Finance	20
	• Campus Ministry	24
	• Student Affairs	26
	• Varsity Athletics	30
	• Advancement	32

I Introduction

Stonehill College has invested three years in a strategic planning process that has required a deliberate and searching examination of the College's identity, mission, and future direction. In consequence – and with the cooperation of every constituency of the College – we have affirmed our commitment to move forward with a renewed sense of purpose, with specific goals to strengthen the College's fundamental activities, and with the aim to secure for the College an enhanced reputation in the academic community at large.

The College community has embraced a clear vision: to make Stonehill a recognized leader in challenging men and women of diverse backgrounds to enter into intellectual, social and moral discovery – informed by liberal arts, Catholic and Holy Cross traditions – and in working with students as they build meaningful lives, rewarding careers and participatory citizenship. Stonehill will accomplish these goals by cultivating a student-centered environment where small classes and enriching student-faculty relationships create the setting for intellectual adventure in a variety of high-quality academic programs. While providing a community that offers intellectual and character challenges, Stonehill will also help students to meet those challenges. At this exciting moment in our history, we must seize the opportunity to build on our strengths and to dream of even greater possibilities.

Clearly, realizing this vision will require us to commit significant resources and energies to our academic program and to its critical support functions. It must also be recognized that environmental conditions in the period ahead will present many difficulties. Economic conditions are forecast to be less favorable than those of the recent past and the intensely competitive conditions now prevailing in higher education are expected to continue. These conditions will include increased aggressiveness on the part of state supported institutions and ongoing upward pressure on the tuition discount rate as both public and private institutions attempt to strengthen their market positions. In the view of many industry analysts, the upcoming period will be particularly challenging for smaller, liberal arts-oriented institutions.

As Stonehill prepares for the tough years ahead, it can do so with confidence. It has a growing academic reputation, a well-established market position with a large applicant pool, and an endowment of close to \$100 million. It has an attractive campus with excellent facilities and a dedicated and competent employee group. With these strengths and the strategic direction established in this document, there is every reason to believe that the College will make significant progress in the period ahead in the fulfillment of its mission.

II Mission

Early in the planning process the decision was made to revise the mission statement in an attempt to better define the College's distinctive character and strategic direction. The revised statement, shown below, sets forth a vision of achieving national recognition for academic quality, a commitment to the liberal arts and a clear indication of the importance to the College of its Catholic and Holy Cross traditions.

Mission Statement

Stonehill College seeks to mark out a place among the nation's quality institutions of higher education. It is the mission of the College to provide education of the highest caliber, grounded in the liberal arts, comprehensive in nature, nurtured by Catholic intellectual and moral ideals and committed to the creation of a just and compassionate world.

To accomplish this vision students undertake a program of studies which encourages scholarship, critical analysis and creative thinking. Faithful to the Holy Cross tradition in education, Stonehill is committed to developing the moral, spiritual, intellectual and social competencies of its students as well as fostering the determination to bring these competencies to bear on matters of social justice.

Through study of the core disciplines of the liberal arts, students engage the wisdom and the questions that are the foundation of an educated mind. Mastery of the specialized knowledge required by today's professions provides the tools to lead productive careers and to shape the world beyond the classroom.

The presence of Catholic intellectual and moral ideals places the College in a long tradition of free inquiry, the engagement with transcendent theological and philosophical ideals and values, the recognition of the inherent dignity of each person, and the sense of obligation to commit oneself to moral ends.

In celebration of this dignity and of the unity of the human family, Stonehill supports a diversity of persons, of opinions and of cultural and religious perspectives. The College affirms that appreciation of this diversity is integral to the acquisition of personal and intellectual breadth.

The faculty, inspired by a passion for teaching, collaborate with the staff to create a student-centered climate which promotes academic challenge and rigorous inquiry, physical well-being and emotional growth, personal responsibility, cooperative learning and authentic community. A Stonehill education encourages students to develop a lifelong desire for self-discovery and commitment to service that will lead to truly purposeful and rewarding lives

As indicated in the introduction, the proposed plan has been designed to ensure significant mission-related progress during the current planning period. The priorities that have been established during the planning process and the specific objectives and key initiatives expressed in this document represent actions that must be successfully implemented if the desired progress is to be achieved. Our strategic plan is ambitious. It will represent an attempt to attain a new level of academic excellence while concurrently strengthening and expanding our financial position. To accomplish the latter, it will be necessary to improve the College's economic structure by upgrading the revenue stream and by developing clearly focused spending programs. The plan to accomplish this is an integral part of the strategic program.

III Objectives, Key Initiatives

There are seven institutional objectives, each of which addresses a critical priority area for the upcoming planning period. Implementation responsibilities have been defined for each objective together with an estimate of the timeframe involved. Action plans at the divisional level have been, or will be, developed to ensure an integrated plan. A summary of each of the divisional plans is attached to this report.

1. Academic Excellence

Develop an academic program which will support the vision of the College to be recognized as one of the nation's quality institutions of higher education.

(Responsibility: K. Conboy, Vice President for Academic Affairs)

Initiatives

- ◆ Establish in fall 2001 a new General Education curriculum as a cornerstone program of the academic plan. The new curriculum will provide (among other features) a common first year academic experience for all students which will be taught exclusively by full-time faculty. Throughout the four-year program, the traditions of small classes and close student-faculty interaction will be maintained, and there will be a dramatic opening up of the existing Western Heritage curriculum to introduce a liberal arts core with fresh global perspectives.
- ◆ Working with the expertise of the Student Affairs division, construct a co-curriculum that augments the General Education Program in the development of reflective and active citizenship, political and social awareness and a commitment to public service in all our students. *(Basic program to be in place during FY 2002)*
- ◆ On an ongoing basis provide appropriate support to the instructional enterprise as it augments the opportunities for student-faculty collaborative research; develops stronger internships, international and experiential learning opportunities; and commits to investigating options for service learning within the curriculum.
- ◆ On an ongoing basis provide support for faculty development. This support will include development needs related to new curricular goals; funds to ensure a high level of scholarship for basic research and for the development of new teaching and learning models.
- ◆ On an ongoing basis, provide support for academic diversity initiatives, including new curriculum opportunities, new recruiting tools, senior appointments, a recruitment reward plan, and faculty exchange opportunities.
- ◆ Establish in fall 2001 a Center for Academic and Professional Excellence. The Center will provide resources and personnel to assist students who seek information about academic opportunities, international programs, internships, graduate and professional schools, post-graduate awards and career opportunities. Personnel with both academic and student affairs backgrounds will join together in a common effort to better service students.

- ◆ Establish the necessary support programs and controls to ensure the successful implementation of the recently approved admissions guidelines. This is essential if we are to maintain or enhance our academic profile, attain our diversity targets and protect the college's revenue stream. (*Ongoing effort starting with the Class of 2005.*)

2. Assessment

Continue and further develop the College-wide assessment program initiated during the current academic year. The program will measure effectiveness at the institutional, divisional and departmental level and will include a major focus on the assessment of student outcomes. Overall coordination of the program together with survey and analytical support will be provided by the Office of Institutional Research.

(*Responsibility: Divisional Vice Presidents; all segments of the program will be in place by 6/30/02.*)

3. Catholic Identity

This topic is critical to the fulfillment of the College's mission which speaks in terms of "Catholic intellectual and moral ideals" and a commitment "to the creation of a just and compassionate world."

It is recommended that the recently initiated dialogue be continued in an attempt to explore and define the most effective ways for the College to enhance its Catholic character. The goal of this dialogue should be the development by 6/30/02 of a broad-based plan for review by the College community. Initiatives and action plans will be developed after completion of this review.

(*Responsibility: J. Denning, C.S.C., Vice President for Mission.*)

4. Diversity

Progress with respect to student diversity has been reasonably satisfactory but more needs to be done. Students of color now represent slightly in excess of 6% of the total student body. The situation with respect to employee diversity is not satisfactory. Employees of color represent only 4% of the total staff, faculty and administration, and there is no representation in senior level administrative positions.

The subcommittee on Diversity has recommended a target of 10% by 2005 for both students and employees and this has been agreed to by the Strategic Planning Committee.

Initiatives

- ◆ The student recruitment goal will be achieved within the framework of the recently approved admissions guidelines.
(*Responsibility: B. Murphy, Dean of Admissions and Enrollment.*)
- ◆ The employee goal will be achieved through the coordination of individual plans developed by each division.
(*Responsibility: Divisional Vice Presidents assisted by the Directors of Human Resources and Intercultural Affairs.*)
- ◆ Fund raising efforts to provide any necessary resources in excess of budgeted funds will be made by the Advancement Office.
(*Responsibility: F. Dillon, Vice President for Advancement.*)

5. Service

The College has long recognized its responsibility to address the needs of society and traditionally has encouraged its students to develop a lifelong commitment to service. It has done this through institutionally sponsored programs at the community, regional and international level and by actively supporting many types of individual volunteerism.

Over the years the opportunities for students to serve have increased significantly and are now made available through various College departments. Currently, there is a need for coordination. There also is a need to establish objectives and standards, and to expand the service learning program which involves academic credit.

(Responsibility: K. Conboy, Vice President for Academic Affairs; G. Mulligan, C.S.C., Vice President for Student Affairs; J. Denning, C.S.C., Vice President for Mission.)

Initiatives

- ◆ Prepare a baseline assessment of the full range of the College's service-related activities undertaken during FY 2002. Assess strengths and weaknesses of the overall program and identify opportunities for improvements and for new activities. Final report due fall 2003.
- ◆ The College has applied for a full-time VISTA volunteer for FY 2002 to assist in the integration and coordination of service-related activities. If the request is approved, the volunteer will work under the supervision of Nuala Hetzler of Campus Ministry. The experience gained during the year will help define the type of coordinating effort needed for the longer term.

6. Technology

Strength in technology is a competitive necessity. It is essential, therefore, that a comprehensive plan be developed to provide a reliable, secure and cost effective information service for students, faculty and staff. The end goal will be improved academic and administrative effectiveness.

(Responsibility: G. Hammon, Director of Information Technology.)

Initiatives

- ◆ Submit an initial draft of the proposed Technology plan to the Strategic Planning Committee no later than December 31, 2001.
- ◆ Create a unified technology operation by merging the existing academic and administrative departments under the new information officer. *(Fall 2001.)*
- ◆ Provide support and training for faculty in the application of technology in the classroom. *(Ongoing.)*
- ◆ Provide support and training to staff and administrative personnel in activities involving potential productivity improvements. *(Ongoing.)*

7. Financial Resources

****Financial Management***

Implement and further develop the financial plan set forth in this document to ensure the generation of funds necessary to support the proposed academic plan and related priority programs. The plan will require careful management of revenues, expenses, capital expenditures and cash flow. It will include fund raising, but no additional long-term debt. ⁽¹⁾ *(Responsibility: E. Casieri, Vice President for Finance. Ongoing.)*

****Fund Raising***

Expand the annual unrestricted private grants and gifts program targeting proceeds of \$1,000,000 for FY 2005 (FY 2001 = \$600,000). *(Responsibility: F. Dillon, Vice President for Advancement. Ongoing.)*

Expand the annual restricted programmatic and endowment contributions by 10-12% per year. The targets for FY 2005: Restricted programmatic = \$1,200,000; Endowment = \$1,000,000. *(Responsibility: F. Dillon, Vice President for Advancement. Ongoing.)*

Develop the basis for a capital campaign to be initiated in FY 2003. The Board of Trustees will be asked to endorse the general plan at its spring 2001 meeting and the case statement at its spring 2002 meeting. A feasibility study will be conducted during the summer and fall of 2002 and reviewed by the Board at its winter 2003 meeting. *(Responsibility: F. Dillon, Vice President for Advancement.)*

- (1) The addition of long-term debt will be considered only if fund raising success results in a material increase in net assets.

IV Financial Plan

In developing the financial plan for the period through FY 2005, the goal has been twofold: 1) to provide the funds necessary to implement the strategic program; and 2) to correct a weakness in the College's existing financial position. The two objectives interrelate. As discussed at the January Board meeting, the current financial position is satisfactory in terms of liquidity, endowment size, endowment income and debt coverage, but weak in terms of cash generation. The problem stems from the institution's economic structure. On the revenue side, we do not derive sufficient funds from tuition, private gifts and grants. On the expense side, too high a proportion of total expenses is accounted for by depreciation and interest charges, a result of facilities expansion of the recent past. Adjustments to the revenue/expense structure will be required to bring the annual cash flow to a level necessary to support planned strategic initiatives.

The plan anticipates revenue improvements to come from optimizing tuition and fee levels, a tight control of tuition discounts, and a more aggressive annual fund effort. On the spending side, operating expenses for the period will be controlled by focusing spending primarily on priority areas. Capital expenditures will be controlled by limiting new approvals to essential projects. The latter strategy will preserve cash for strategic initiatives and also lead to a reduction in the proportion of total expenses accounted for by depreciation and interest.

Summary data from the proposed plan is shown below:

	-----\$ millions-----			
	<u>2000A</u>	<u>2001E</u>	<u>2005F</u>	Av. Annual % Inc./ (Dec.) <u>2005 vs 2000</u>
Operations				
Revenues	\$ 42.9	\$ 46.8	\$ 57.1	5.9%
Expenses	<u>42.0</u>	<u>45.3</u>	<u>55.7</u>	5.8%
Surplus	<u>\$.9</u>	<u>\$ 1.5</u>	<u>\$ 1.3</u>	9.2%
% of Revenues	2.2%	3.2%	2.4%	
Tuition Discount	32.6%	32.4%	32.7%	
Resources				
Total Assets	\$188.5	\$198.1	\$205.2	1.7%
Total Liabilities	<u>65.5</u>	<u>69.1</u>	<u>54.5</u>	(3.6%)
Total Net Assets	<u>\$123.0</u>	<u>\$129.0</u>	<u>\$150.7</u>	4.1%
Endowment	\$ 96.7	\$102.8	\$120.0	4.4%
Long-Term Debt ⁽¹⁾	\$ 58.5	\$ 62.7	\$ 48.0	
Total Assets/LTD	3.2x	3.2	4.3	
Debt Service Coverage	1.8x	1.8x	1.9x	
Annual Net Cash Flow	\$ 1.2	\$ 1.7	\$ 1.7	

⁽¹⁾ The defeased debt, which is included in 2000 and 2001, will be liquidated in 2003.

The plan anticipates a modest operating surplus and net cash flow each year, a build-up in net assets and endowment, and a reduction in long-term debt. Some debt will be refinanced during the period but there will be no additions.

A detailed description of the assumptions used in the development of the financial plan is shown below. These descriptions are followed by a graph depicting the long-term trends in revenues, expenses and operating margin, and a forecast of cash flow.

- **Enrollment**

For financial planning purposes the average day enrollment (FTE) for the forecast period has been established at 2,125. This estimate reflects the impact of the over enrollment of the Class of 2004, the College's current residential capacity and the limited potential of the commuter market. (Of the total applications of 4,931 received for the upcoming year, only 2% represented commuters.)

The forecast also takes into consideration a program to be initiated in FY 2002 to encourage more students to take advantage of off-campus opportunities for international study and internships. The program will be designed in a manner to relieve the crowded dormitory conditions experienced in fall 2000 and to seek an improved balance in dormitory utilization between the fall and spring semesters.

- **Tuition and Fees**

Stonehill's tuition and fees are relatively low compared to competitor institutions. In a comparative analysis relating to the current academic year, our tuition and fees ranked thirteenth out of a group of fourteen institutions. There is little likelihood that we can significantly improve our ranking during the planning period, but it is imperative that we follow a pricing strategy for annual adjustments equal to competition. It is our judgment that the competitive level will approximate 6% in FYs 2002 and 2003, and 5% in FYs 2004 and 2005.

- **Room and Board**

Annual increases of 4% have been assumed. This will cover all expected cost increases.

- **Tuition Discount Rate**

The current freshman rate of 34% has been used for all forecast years. Our basic strategy is to hold the line and to use this rate as the upper limit for the planning period. It is fully recognized that the competitive climate will tend to exert upward pressure on existing rates and that our goal may prove to be optimistic. Should this happen, we will have to make offsetting adjustments in other areas.

- **Compensation**

Payroll has been projected at an annual rate of increase at 4%. Assuming an inflation rate of no more than 3%, this should be adequate.

- **Operating Expenses**

Expenses other than payroll have been forecast by individual division heads at a level to support the strategic program of the respective divisions. All divisional spending plans have been made within the framework of institutional guidelines.

- **Endowment Total Rate of Return**

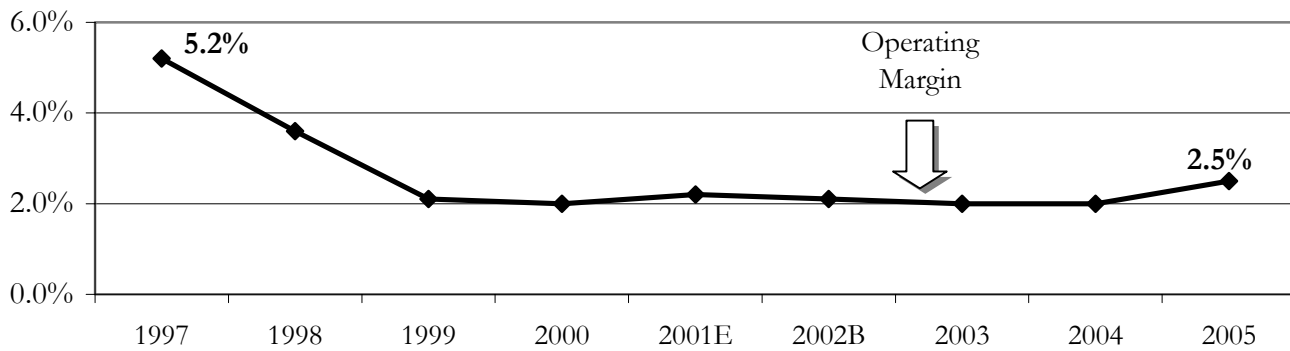
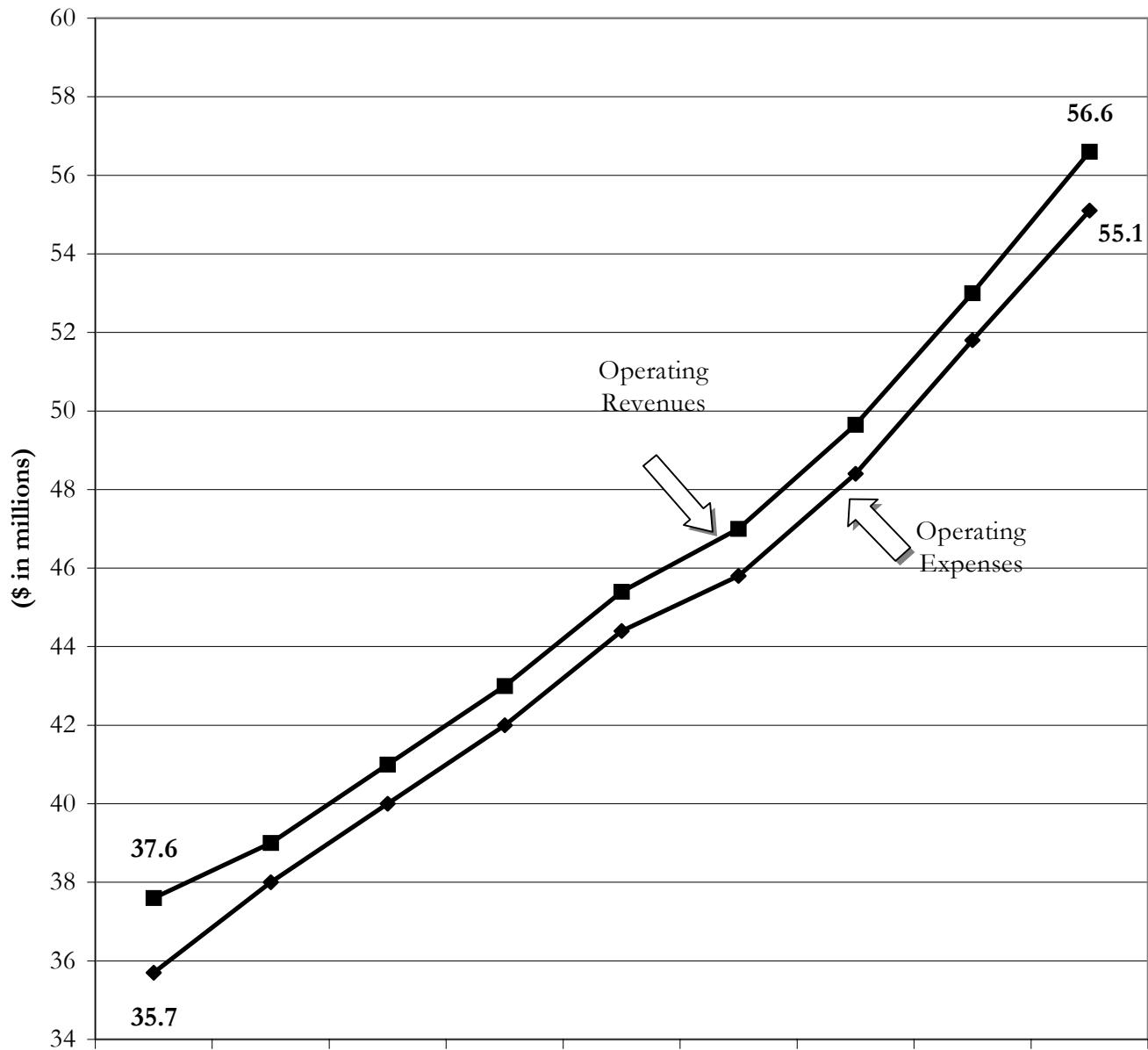
The rate of return assumed in the plan is 8%. This represents the targeted rate established by the Board of Trustees. Use of this rate in the forecast assumes that the current unfavorable conditions in the equity markets will not have longer-term impact.

The annual spending rate used in the forecast represents 5% of the average market value of the endowment at the end of the previous three years.

The graph on Revenue/Expense Trends follows on the next page. The operating margin shown on the graph portrays a decrease from 5.2% in 1997 to 2.2% in 2000. This reflects the increasing costs of financial aid, and higher expenses related to depreciation, interest and technology. The operating margin for FY 2001 is expected to be 3.2%. The increase vs. FY 2000 is attributable to higher enrollment (80 students) and to the 6% increase in tuition and fees. Margins are expected to decrease in 2002 and 2003 and show modest increases thereafter reaching 2.4% in 2005. Longer term, the College will target an annual operating margin of 3%.

(Graph Follows)

Revenue – Expense Trends



The cash flow projection for the planning period is shown on the next page. As indicated earlier, the financial plan is expected to generate a positive net cash flow each year and a total of \$6.3 million for the five-year period. In the event that the cash flow materializes as forecast, it is most probable that decisions will be made during the period to use the cash for strategic initiatives, capital expenditures or transfers to the endowment. It would be premature to make such plans at this time. Longer range forecasts do not normally have this degree of accuracy.

The capital expenditures included in the cash flow projection total \$19.9 million of which \$10.7 million or 54% represent approved projects. The major items in this category are the new residence hall completed last fall, the Roche Commons social space and the Cushing-Martin renovation now underway. Of the projects to be approved, the only major item under study is the athletic addition to the College Center which is expected to cost \$2 million and is necessary to allow the College to better meet its gender equity obligations. The remaining amounts in the “to be approved” category represent provisions for technology projects, smaller maintenance/renovation type projects and faculty offices late in the period (yet to be defined).

(Schedule Follows)

Stonehill College Statement of Cash Flows

	2001 (000)	2002 (000)	2003 (000)	2004 (000)	2005 (000)
	Estimate	Budget	Forecast	Forecast	Forecast
Operating					
Source of Funds					
Operating Surplus/Deficit	\$1,477	\$1,191	\$983	\$1,200	\$1,347
Depreciation	3,311	3,611	3,877	4,073	4,238
Amortization	<u>95</u>	<u>96</u>	<u>96</u>	<u>96</u>	<u>96</u>
Total Source of Funds	<u>4,883</u>	<u>4,898</u>	<u>4,956</u>	<u>5,369</u>	<u>5,682</u>
Use of Funds					
Capital Expenditures	10,447	3,020	2,790	1,388	2,230
Working Capital	-	-	-	-	-
Short Term Investment - Inc/(Dec)	<u>500</u>	<u>500</u>	<u>-</u>	<u>500</u>	<u>500</u>
Total Use of Funds	10,947	3,520	2,790	1,888	2,730
Cash Surplus/(Deficit)	<u>(\$6,064)</u>	<u>\$1,378</u>	<u>\$2,166</u>	<u>\$3,481</u>	<u>\$2,952</u>
Financing					
Unrestricted Private Gifts & Grants **	\$600	-	-	-	-
Long Term Debt****					
Proceeds	5,258	-	-	-	5,562
Repayments	(1,153)	(1,287)	(10,393)	(1,722)	(7,233)
Nonoperating loss on early retirement of debt	-	-	(175)	-	-
Restricted Cash - (Inc)/Dec	<u>3,028</u>	<u>482</u>	<u>8,896</u>	<u>105</u>	<u>425</u>
Cash Surplus/(Deficit)	\$7,733	(\$806)	(\$1,672)	(\$1,617)	(\$1,246)
Net Cash Flow					
Annual	<u>\$1,669</u>	<u>\$572</u>	<u>\$494</u>	<u>\$1,864</u>	<u>\$1,706</u>
Cumulative	<u>\$1,669</u>	<u>\$2,241</u>	<u>\$2,735</u>	<u>\$4,599</u>	<u>\$6,305</u>

** Beginning in FY02, "Unrestricted private gifts and grants" are recognized as operating revenues and therefore are reflected in the "Operating surplus/deficit" figure on this statement.

****In FY01, the College receives the remaining \$5.258 million in HEFA D Pool debt proceeds for the purpose of constructing the new dormitory. In FY03, the College will pay off \$8.79 million in defeased debt with cash restricted for that purpose. In FY05, the College will refinance maturing debt in the amount of \$5.5 million.

The assumptions used in the development of the financial plan are believed to be reasonable. Also, the proposed plan itself in the view of the senior management group represents an accurate portrayal of their expectations.

It must be recognized, however, that because of the many uncertainties in the economic, industry and competitive outlooks, there will undoubtedly be some unforeseen changes. The assumptions that would seem to present the most probable downside risks relate to the tuition discount, the tuition/fee increases and the fund raising program. Should these factors become unfavorable, it could prove necessary to defer certain strategic initiatives and/or capital expenditures.

V. Areas for Further Study

There are some areas of strategic significance that could not be adequately addressed in the planning process because of the need for further study. Committees will be formed to address these subjects with the objective of providing appropriate planning recommendations to the Strategic Planning Committee.

Areas for study:

- Examine, in depth, the economic feasibility of the preliminary capital expenditure plan for 2006-2010 for the construction of new buildings for Science, Business Administration and Economics, and a 600-seat Theater/Auditorium. The total cost in current dollars is estimated to be approximately \$30 million.
- Determine the fund raising potential for the College in terms of both facilities expansion as described above and annual operating expense support.
- Determine the long-term role of Continuing Education at Stonehill, particularly the recommendation of an internal study group that the current Division of Continuing Education be restructured as an Office of Part-Time Studies.
- Continue the study of the College's economic structure to better understand questions relating to optimum size, academic mix, facilities utilization, breakeven position, etc. This type of analytical data will be of increasing importance for decision-making in the difficult period ahead.
- Identify a peer group for use in comparative analysis and the development of standards in both academic and non-academic areas. Explore the possibility of developing an information exchange system. (We now exchange annual financial statements with thirteen institutions.)
- Evaluate the potential benefits to Stonehill of entering into partnerships and collaborations.

VI Implementation

The responsibility for the implementation of the strategic program is broad-based and is consistent with the organizational structure of the College. The President and Vice Presidents are responsible for the achievement of the overall plan while department heads and key personnel are accountable for specific objectives and initiatives relative to their respective organizational areas. As was true in the planning phase, every attempt will be made to achieve high employee participation. Planning activities benefited from widespread support and it is expected that the same degree of support will be evident in the implementation stage.

As mentioned earlier, the plan is fully integrated. Each of the divisional plans is supportive of the institutional objectives and consistent with the programs of the other divisions. A summary of each divisional plan follows this section. Each report includes a brief description of the basic strategic thrust for the planning period and a listing of key objectives and initiatives.

It is recognized that successful implementation of the strategic plan will be difficult. External factors previously discussed will present many obstacles. And, the fact that the College does not have a tradition of goal-oriented operations will undoubtedly cause occasional breakdowns, particularly in the first year or two. On the plus side, the attitudes of key personnel are positive and increasingly enthusiastic with respect to the College's future, the academic plan has been well-received, management systems have been upgraded and we have a well-conceived financial plan.

The Strategic Planning Committee played a major role in the coordination and integration of the overall plan. The Committee will also play a key role in the implementation phase. They will monitor progress on both institutional and divisional programs and issue reports to interested parties on an appropriate basis. The monitoring responsibility will include any necessary follow-up to ensure that corrective action is taken when objectives are not being met.

ACADEMIC DIVISION

Introduction

The overall emphasis of the Academic Plan is to shape the culture of Stonehill College as an institution dedicated to academic excellence and committed to using its resources to achieve its educational mission. Our success in transforming the culture depends on clear communication and widespread cooperation.

The plan encourages a community of teaching, learning, and scholarly excellence. Moreover, it offers improved opportunities for students and opens new possibilities for faculty to achieve research, creative, and pedagogical goals. The success of the Academic Plan will require developing open and participatory processes, delegating meaningful responsibilities to academic administrators and department chairs, fostering cross-divisional partnerships, and creating accountability in matters of budget, decision-making, and assessment. By focusing on clear policy, consistent practice, educational and professional growth, organizational stability, and regular review of best practices, the Academic Division will help Stonehill reach its strategic goals.

Academic Objectives

◆ Curriculum

AACSB Accreditation for Business Administration Program: Declare pre-candidacy for AACSB accreditation in 2001. Explore feasibility of accreditation and make recommendations about entering candidacy stage. (*Responsibility: Dean of Faculty. Ongoing.*)

ACS Accreditation for Chemistry Program: Complete process for ACS accreditation with site visit and final recommendations. (*Responsibility: Dean of Faculty. Fall 2003.*)

Curriculum Review: Develop a formal curriculum review process. Create a strategy to rotate curriculum review through each department on a four-year cycle. (*Responsibility: Dean of Faculty and Department Chairs. Implementation date: Fall 2003.*)

General Education Implementation: Implement, over a four-year period, the new General Education curriculum. (*Responsibility: Dean of General Education and Interdisciplinary Programs.*)

Peer Analysis/Best Practices/Standards: Review curriculum areas in light of best practices at peer and reference institutions. (*Responsibility: Dean of Faculty, Department Chairs. Ongoing.*)

Review of Minor Programs of Study: Examine current minor offerings. Explore possibilities for interdisciplinary concentrations. (*Responsibility: Dean of Faculty, Dean of General Education and Interdisciplinary Studies. Fall 2002.*)

◆ **Assessment**

Administrator Evaluation: Develop an administrator evaluation system for the academic division, with measures for evaluation both by supervisors and by faculty and staff. (*Responsibility: Faculty Senate, Vice President for Academic Affairs. Implementation date: Summer 2002.*)

External Review of Departments/Programs: Allocate resources for external review of Departments/Programs facing challenges. Create rubric for such reviews. (*Responsibility: Dean of Faculty. Implementation date: Fall 2002.*)

Performance Measurements (divisional): Develop standards and measurements for divisional progress toward articulated goals. (*Responsibility: Vice President for Academic Affairs. Implementation date: Fall 2002.*)

Performance Measurements (personnel): Review models for performance based salary model. Present findings to faculty for discussion. (*Responsibility: Vice President for Academic Affairs, Dean of Faculty, Faculty Senate. Findings prepared by Summer 2002.*)

◆ **Policies and Procedures**

Academic Policies and Procedures Manual: Develop, publish, and disseminate a manual containing all policies and procedures for actions in the Academic Division. (*Responsibility: Vice President for Academic Affairs. Completion date: Fall 2002.*)

Faculty Handbook Revision: (*Responsibility: Faculty Senate, Vice President for Academic Affairs, College Counsel. Revision complete by Fall 2004.*)

◆ **Budget and Planning**

Budget Analysis: Implement a system of budget analysis that allows managers to review monthly and quarterly budget activity by department or unit. (*Responsibility: Vice President for Academic Affairs, Budget Manager. Implementation date: September 2001.*)

Budget Decentralization: Develop a plan to decentralize the academic division budget, giving more authority and responsibility for budget decisions to Deans, Department Chairs, and Directors. (*Responsibility: Vice President for Academic Affairs, Academic Deans. Implementation date: Spring 2002.*)

Environmental Scanning Program: Seek systematic method to discover best practices at other academic institutions and consider their feasibility for Stonehill. (*Responsibility: Vice President for Academic Affairs. Implementation date: Fall 2002.*)

Expense Reallocation: Continue practice of examining divisional priorities and reallocating the least productive 1% of the budget for new strategic initiatives. (*Responsibility: Vice President for Academic Affairs. Ongoing.*)

Faculty Growth: Use both strategic planning and reallocation from retirements to grow the full-time faculty to 130 over the 5-year period. (*Responsibility: Vice President for Academic Affairs. Implementation: through 2005.*)

Fund Raising: Develop a divisional fund-raising plan for grant-related support of academic initiatives. Set targets for fund-raised budget contributions. (*Responsibility: Vice President for Academic Affairs, Dean of Administration, Director of Academic Development. Implementation date: Fall 2002.*)

◆ **Academic Opportunities**

Academic Advising: Review and revise the academic advising system to address new General Education Goals and outcomes. Create guidelines for using the student electronic portfolio as an advising tool. (*Responsibility: Dean of Administration, Director of Academic Services. Completion date: Fall 2002.*)

Internship Program: Develop – with a faculty advisory committee – standards for academic internships. Create centralized database of internship opportunities. Clarify relationship of internship experience to career goals. (*Responsibility: Internship Coordinator, Dean of Administration. Implementation date: Fall 2002.*)

International Experience/Junior Year Off-Campus: Develop new and sustainable Stonehill programs and internships abroad. Aggressively seek to increase numbers of students seeking international experience and to balance participation over fall and spring semesters. (*Responsibility: Dean of Administration, Director of International Programs. Development of plan by Spring 2002.*)

Phi Beta Kappa: Establish Phi Beta Kappa chapter at Stonehill. (*Responsibility: Dean of Administration, Director of Honors. Ongoing.*)

Post-graduate Awards: Develop system for early identification of potential recipients of post-graduate awards (Fulbright, Marshall, Rhodes, Goldwater, etc.) and develop plan for nurturing these students toward these goals. (*Responsibility: Dean of Administration, Director of Honors Program. Implementation date: Fall 2002.*)

Student Research Opportunities: Expand SURE program for wider participation or year-round opportunities. Seek external sources of funding. (*Responsibility: Dean of Administration. Implementation date: Summer 2003.*)

Undecided Program: Formalize an advising program for students undecided about their major. (*Responsibility: Dean of Administration, Director of Academic Services. Implementation date: Fall 2002.*)

◆ **Development**

Diversity Hiring Plan (Faculty, Staff, Administration): Discuss, document, and implement diversity hiring plan for faculty and academic administration and staff. (*Responsibility: Vice President for Academic Affairs. Implementation date: September 2001.*)

Faculty Development Program: *(Responsibility: Vice President for Academic Affairs, Dean of Faculty. Implementation date: Fall 2002.)*

Instructional Technology: Create a plan to develop faculty interest in and commitment to the creative use of technology in instruction. Provide resources and incentives. *(Responsibility: Vice President for Academic Affairs, Director of Information Services. Implementation date: Beginning Fall 2001.)*

Part-Time Faculty Needs: Continue to enhance salary for part-time faculty. Assess overall need for part-time instruction and explore other options for employment, such as half-time appointments. *(Responsibility: Vice President for Academic Affairs. Recommendations ready for FY 2003 budget discussions.)*

Supervisory Training: Provide adequate supervisory training for Department Chairs and other academic administrators. *(Responsibility: Vice President for Academic Affairs, Director of Human Resources. Implementation date: Fall 2001.)*

Office of Admissions

Introduction

It is the function of the Office of Admissions to provide leadership in formulating annually a cogent enrollment management model, devising an appropriate marketing strategy for its successful implementation, and collaborating with the other divisions of the College in the planning of academic programs, student life initiatives, and physical plant improvements that meet the needs and expectations of our student interest pool. The enrollment model proposes targets for programmatic distribution, gender breakdown, racial and economic diversity, resident population, academic profile, and total F.T.E. enrollment. To insure that these targets are current in representing the needs of the College, the Admissions Office maintains open lines of communication with the Budget and Strategic Planning Committees, and the various divisions of the College.

Specific objectives within the present planning period include:

Further refinement on an annual basis of the enrollment model and coordination of the development of the systems and resources necessary to achieve its target. *(Ongoing.)*

Collaboration with the Office of Administrative Computing to establish an on-line application process. *(Targeted date: Summer 2001.)*

Hire an additional admissions counselor/recruiter to expand the racial diversity of the student body, and increase recruiting activities both abroad to augment our international student base and domestically to enhance our geographical diversity. *(Targeted date: FY 2003.)*

Because of its numerous publications which promote the identity of the College, the Office seeks through the development of a marketing plan to participate in institutional image building initiatives, focusing especially on academic excellence and rigor, in-service programs, our Catholic and C.S.C. heritage. *(Targeted date: 2003.)*

(Responsibility of B. Murphy, Dean of Admissions and Enrollment. Where appropriate, specific responsibilities will be delegated to admissions staff members.)

Career Services – Director of Career Services

- ◆ Develop partnership with academic departments of the College to more closely link the Career Planning Process and employment opportunities to the educational programs at Stonehill College. These partnerships would include speaking to classes on career topics, inclusion of career planning topics in the General Education co-curricular seminar series, and developing an effective faculty advisory group to work with the Internship Coordinator. (*Responsibility: Director of Career Services. Implementation: September 2001. Completion target: May 2002.*)
- ◆ Increase the quantity and quality of employers that participate in on-campus recruiting and the Resume Referral Program. Faculty and College Relations Division contacts will be better utilized to further recruitment efforts and outcomes. (*Responsibility: Director of Career Services. Implementation: September 2001. Completion target: May 2002.*)
- ◆ Work towards increased service to all constituents without restrictions of time and space. In effect, create a “borderless” office. Use technology more effectively using email and the World Wide Web. Development of a web page as a “chatroom” making career services professionals available for “virtual” walk-in hours. (*Responsibility: Director of Career Services. Implementation: September 2001. Completion target: May 2002.*)
- ◆ Effectively market existing and new initiatives to targeted and appropriate constituents of the office. Conduct focus groups, classroom visits, etc. as well as develop enhanced professional publications to market Stonehill to employers and other external constituents. (*Responsibility: Director of Career Services. Implementation: September 2001. Completion target: May 2002.*)

◆ Interdivisional Initiatives

Catholic Identity: Participate in college-wide discussions on Catholic character. Continue to study ways in which the academic division offers expression of the College’s Catholic identity. Assess current offerings, examine models for a Catholic Studies Center or Program, and make recommendations for next steps. (*Responsibility: Vice President for Academic Affairs. Recommendation date: September 2002.*)

Co-curricular Programs: Explore ways to coordinate first-year core co-curriculum with curriculum and social adjustment needs. (*Responsibility: Dean of General Education, Co-curriculum coordinator. Implementation date: Fall 2001.*) Seek coordination of other co-curricular activities (Martin Institute, Honors Program, etc.) to link with curricular offerings. (*Responsibility: Dean of Faculty, Co-curriculum Coordinator. Ongoing.*)

Service Learning: Participate in college-wide discussion of service. Explore service learning options for Stonehill’s curriculum. (*Responsibility: Dean of General Education, Dean of Administration. Ongoing.*)

FINANCE DIVISION

Introduction

The Strategic Planning Document for the period through FY 2005 indicates that the College's financial plan has two primary goals. The first goal is to provide the funds necessary to implement the strategic program. The second goal is to correct weakness in the College's existing financial position.

The divisional objectives itemized below outline the Finance Division's basic strategic plan for this period. They also explain how these objectives are tied in with the overall institutional plan and how their successful completion will benefit both the College and the division.

FINANCIAL MANAGEMENT

▪ Budgetary Information Systems

Financial Model: Continue to improve the financial model as a key tool in the long-range financial planning process. Refine the model by meeting with key individuals within the College. *(Responsibility: S. Beauregard, Assistant Controller. Completion target: FY 2002.)*

Budget Development: Improve the budget development process by leveraging off of the financial plan and the initiatives reflected therein. Continue the development of the capital budget process. *(Responsibility: S. Beauregard, Assistant Controller. Ongoing.)*

Divisional Information Needs: Hold discussions with division heads in order to assess information needs. Design reporting tools in order to facilitate the effective management of divisional resources. *(Responsibility: S. Beauregard, Assistant Controller. Completion target: FY 2002.)*

Intranet Web Site: Develop a financial planning and budget web page on the College's intranet. Document budgetary policies/procedures. Provide the community with summary financial information about the College, and links to current industry and economic commentary in an effort to improve the community's understanding of the financial environment within which the College operates. *(Responsibility: S. Beauregard, Assistant Controller. Completion target: FY 2003.)*

◆ **Strengthening of Financial Position**

Improve the Operating Margin: Manage revenues and expenses in a manner to work toward a targeted 3% annual operating margin by the end of the planning period. Ensure that all involved in the budgeting and financial planning process proceed with this as a target. *(Responsibility: Budget Committee. Ongoing.)*

Controlling Tuition Discount Rate: Our goal is to limit the freshman discount rate to 34%. This includes all general scholarships, need-based grants, and cultural diversity awards. The freshman discount rate acts as the driver for the total institutional discount rate since the funding is then renewed for the student cohort within established parameters as they move toward graduation.

Therefore, by controlling the freshman discount rate, we are exerting downward pressure on the total institutional discount rate.

- Within the Scholarship and Grants Committee process, offer awards to accepted freshmen that project to result in a 34% or lower discount rate.
- Monitor the results of the Scholarship and Grants Committee's work in awarding freshman scholarships to assure the rate of 34% or less is achieved each year.
- Assess discounting practices of competitor and aspirant schools to allow for informed decision making when considering any changes to awarding policies.
- Monitor the College's overall discount rate to assure that renewal policies do not exacerbate the discount rate, best utilizing external aid sources while providing sufficient resources for returning students in support of retention efforts.
- Monitor discounting practices outside of scholarship, need-based, and diversity awards to assure that these less-controllable categories (basketball, presidential, and student activities scholarships, faculty/staff/apostolate/family remissions) are within reasonable parameters, making recommendations for change when appropriate. (*Responsibility: E. O'Leary, Director of Student Aid and Finance. Ongoing.*)

Debt Management: Through a judicious use of cash flow, ensure that all strategic initiatives undertaken during the planning period are financed internally or through fund raising and that no additions to long-term debt are made. The objective is to reduce long-term debt as scheduled from its current level of \$62.0 Million to \$48.0 million by the end of FY 2005. This strategy will improve the College's credit ratios and place it in a position to borrow additional funds in future planning periods should this prove desirable. Longer term, the College will operate with credit ratios comparable to the median ratios published by Moody's for A-Rated Small Institutions. (*Responsibility: E. Casieri, Vice President for Finance. Ongoing.*)

Endowment Growth: Initiate a study to develop preliminary financial plans for the period FY 2006-2010. The study will identify resource requirements, fundraising and financing possibilities, and endowment targets. Preliminary discussions have suggested an endowment target for FY 2010 in the range of \$200-\$250 million (*current dollars*).

While this specific target will require an in-depth study, the ultimate goal is to expand and strengthen the College's financial position. This will be done by widening its revenue stream to ensure the source of funds needed to support the proposed academic plan and related priority programs. In addition, widening the revenue stream will decrease the College's dependence on tuition and fees to support current operations. (*Responsibility: E. Casieri, Vice President for Finance. Completion target: Fall 2002.*)

MASTER PLAN

Over the course of the next two years, the Department of Facilities Management, in conjunction with a Master Planning Committee, will develop a College Master Plan for the period FY 2006 and beyond. This plan will provide a moving picture of what the physical components of the campus will look like over the next planning period. The plan will address areas related to structures, parking, roads, walkways, athletics, and utilities infrastructure, in a way that blends all

elements together. This will be done with information from College sources regarding expected campus population, academic program growth, projected housing needs, projected athletic needs, and any other available information. (*Responsibility: E. Casieri, Vice President for Finance; R. Bertram, Director of Facilities Management.*)

TECHNOLOGY

Introduction

The goal of the Information Technology Department is to support the College's mission in *providing education of the highest caliber*. For the Academic Division, our goal is to leverage technology to increase the level of effectiveness in the classroom. For the entire community, our goal is to increase access to information, facilitate communication among the entire community and improve administrative processes.

For the planning period 2001 through 2005, the focus of technology will center around several key issues: developing and improving the College's technology strategic plan, developing the use of technology within the Academic Division for effective teaching and learning, improving administrative systems, and defining and implementing a campus-wide web strategy. Given that the future of technology continues to bring new and unexpected surprises, we will continue to monitor new technologies and be prepared to adopt the new technologies needed to fulfill the College's mission.

Working with the Academic Division, we will assist in instructional technology issues by working with the faculty to design new electronic classrooms and provide a support mechanism that gives all faculty members reliable and timely support. These modern classrooms will provide the tools to conduct powerful lectures that will lead to effective teaching and learning and permit wider exploration of material using new technologies.

Outside the classroom, we will enable all groups on campus to communicate with more flexibility and more options. We will build new systems that will allow greater on-line services, automate and improve existing operations, and develop our technology infrastructure.

Development of a Long-Term Strategic Plan for Technology: The revision of the June 1999 Technology Plan will require a newly created Technology Committee whose membership and governance must be well formed and clearly defined. This committee will assist the Director of Information Technology in the revised Technology Plan. It would be the goal of this committee to submit an initial draft of the proposed Technology plan to the Strategic Planning Committee no later than December 31, 2001.

The plan will cover all broad aspects of technology issues on campus. It will include a vision (where to go), the strategy (how to get there), and implementation (what to do). Among the many issues addressed will be the determination of appropriate funding and staffing levels of the IT division, discovering the technology needs of the College, the prioritization of initiatives, the exploration of best practices and the measurement of our operations against benchmarked data. (*Responsibility: G. Hammon, Director of Information Technology. Completion target: December 31, 2001.*)

Continued support of the Academic Mission of the College: Working with the new Director of Instructional Technology, it will be our goal to support those faculty members using technology for their research and teaching endeavors. We will continue to create reliable electronic classrooms and support and implement systems that aid in the assessment of learning outcomes and departmental effectiveness. *(Responsibility: Director of Instructional Technology; G. Hammon, Director of Information Technology. Ongoing.)*

Administrative System Improvement: We will review each department's current processes and provide support and training in activities involving potential productivity improvements. Through continuous evaluation of existing processes, we will find ways to automate and improve existing practices in order to boost productivity and achieve cost savings.

As we deploy new technologies, we must ensure adequate support for those technologies to fully utilize the College's investment. *(Responsibility: C. Binney, Director of Administrative Computing. Ongoing.)*

Web-based systems development and integration: Establishing an ongoing web-based strategy for the entire campus will be a key part of the overall technology plan. The web strategy involves teaching and learning and provides the web tools that enhance and improve the institution's communication system and services. *(Responsibility: G. Hammon, Director of Information Technology; T. Flynn, Web Administrator. Completion target: December 31, 2001.)*

Human Resources

Finalize and implement a tactical plan for the establishment of a broad-based human resources department replacing the existing employment services office. The new human resources function will be phased in over the next three years and will be fully operational by the end of FY 2004.

Objectives of the human resources department will include the development and distribution of a staff/administrative handbook, a comprehensive wage & salary study, establishment of a performance management program, a formalized recruitment process, enhanced efforts to increase employee diversity on campus, and a new employee orientation program. Progress reports covering both the development of the new department and specific project accomplishments will be provided on an annual basis. *(Responsibility: M. Fonseca, Director of Human Resources.)*

CAMPUS MINISTRY

Mission

The mission of Campus Ministry is to provide reflection, worship and service opportunities that develop in members of the college community a deeper appreciation of the message of Jesus and a readiness to live out that message in their own lives. Campus Ministry seeks to create an environment where both Catholics and those of other backgrounds can deepen their spirituality. It is concerned about each person's development and it seeks to help in the formation of leaders who will contribute to shaping a just and compassionate society.

Objectives

- ◆ **Objective** **To clarify Stonehill's Catholic identity**
Initiative Campus Ministry will cooperate in establishing a campus-wide, inclusive committee on religious affairs.
 - The committee will be responsible for articulating Stonehill's relationship to the Catholic Church.
 - The committee will examine how the College implements its mission of forming men and women committed to shaping a just and compassionate society.

(Responsibility: J. Denning, C.S.C., Vice President for Mission. Ongoing.)

- ◆ **Objective** **To clarify Stonehill's sponsorship by the Congregation of Holy Cross**
Initiative In collaboration with members of the Congregation, Campus Ministry will help to formulate what it means to be in the "Holy Cross Tradition." *(Responsibility: J. Denning, C.S.C., Vice President for Mission. Evaluate June 2002.)*

Campus Ministry will prepare orientation material on this topic for new faculty, staff and students. *(Responsibility: Campus Minister. April 2002.)*

- ◆ **Objective** **To create awareness among students about the Church's command to serve the needs of neighbor and community**
Initiative Campus Ministry will further develop students' awareness of peace and justice issues by building on their experiences in the ITS and H.O.P.E. programs. *(Responsibility: Campus Minister for Community Service. Evaluate June 2002.)*

Campus Ministry will also seek to take part in the larger discussion of service learning within Academic Affairs.

- ◆ **Objective** **To create a welcoming atmosphere on campus**
Initiative In collaboration with other departments, Campus Ministry will work to create a hospitable spirit within the classroom, residence halls and workplaces. *(Responsibility: J. Denning, C.S.C., Vice President for Mission. Evaluate June 2002.)*

As Stonehill seeks to become more diverse, Campus Ministry will develop a more explicit ministry for students who are not Catholic. (*Responsibility: J. Denning, C.S.C., Vice President for Mission. Evaluate June 2002.*)

◆ **Objective** **To deepen spiritual life on campus**

Initiative

Campus Ministry will extend liturgical and other services to residence halls in an outreach effort to foster personal and communal prayer and reflection. (*Responsibility: Campus Minister. Evaluate June 2002.*)

Campus Ministry will develop on the web pages topics concerning the spiritual and moral life. (*Responsibility: Campus Minister. Evaluate January 2002.*)

STUDENT AFFAIRS DIVISION

Introduction

The Student Affairs Division is committed to enhancing co-curricular student learning, establishing and assessing student outcomes and creating a positive and purposeful campus climate. The future at Stonehill must be concerned with the entire learning culture in our community and the Student Affairs Division will be an important partner in that interest.

Division Objectives

- ◆ To promote a student culture that encourages learning and responsible citizenship. Complete environmental audit, develop focused co-curriculum program with outcome goals and measurements. *(Responsibility: G. Mulligan, C.S.C., Vice President of Student Affairs and Associate Vice Presidents of Student Affairs. Implementation: September 2001. Completion target: May 2002.)*
- ◆ Establish increased partnerships with faculty and Campus Ministry to blur the distinction between “Academic Affairs” and “Student Affairs,” with common objectives and programs. *(Responsibility: G. Mulligan, C.S.C., Vice President of Student Affairs and Associate Vice Presidents of Student Affairs. Implementation: September 2001. Completion target: Ongoing.)*
- ◆ To further develop a diverse college community with a collegial environment where individuals respect various perspectives and opinions. This would be assisted by a diversity audit and more focused programs. *(Responsibility: G. Mulligan, C.S.C., Vice President of Student Affairs and Associate Vice Presidents of Student Affairs. Implementation: September 2001. Completion target: May 2002.)*
- ◆ Continue to monitor the efforts of the Task Force on Alcohol and Other Drug Concerns, since this is such a critical area for shaping our campus culture. The CORE Survey would be administered and results reviewed and related to relevant programming and policy development. *(Responsibility: G. Mulligan, C.S.C., Vice President of Student Affairs and Associate Vice Presidents of Student Affairs. Implementation: September 2001. Completion target: May 2002.)*

Departmental Objectives

Residence Life

- ◆ Develop an intellectual learning environment in the residence halls to enhance students’ academic lives through co-curriculum learning experiences. Focus on increasing our involvement of faculty in residential programs and work to offer programs that complement seminars offered as part of the General Education Curriculum. Encourage faculty to utilize our common area spaces within our residence areas for teaching opportunities, such as review sessions, etc. In addition, continue our weekly current event Jeopardy Programs and Merit Point Programs to emphasize the importance of intellectual programming. *(Responsibility: Director of Residence Life. Implementation: September 2001. Completion target: May 2002.)*
- ◆ Promote the importance of the development of the whole person by increasing the focus on the enduring values of a Holy Cross education. Encourage our hall chaplains to become more involved in programming within the halls and work to offer weekly services in all residential areas on campus. Continue to offer training to our Resident Assistants on Holy Cross values so

that they can incorporate these values into their programming efforts. In addition, incorporate a mandatory service program within the RA requirements for each semester, with the goal of strengthening our partnership and increasing our collaborative work with Campus Ministry. *(Responsibility: Director of Residence Life. Implementation: September 2001. Completion target: May 2002.)*

- ◆ Facilitate a community that respects, celebrates and insures the safety and dignity of all community members. Continue to require that RAs support events such as Fear No People, National Coming Out Day, Black History month, Women's History Month, etc. Work with Campus Police to create a "Community Officers" program in which specific officers will meet with each residential area on a monthly basis to discuss current issues, upcoming programs, etc. Work with the Counseling and Testing Center to train RAs on providing sexual harassment training to all residential students at the start of each fall semester. Continue to actively recruit students of color for leadership roles in our residence areas as well as diverse professionals to assume our Residence Director and Area Coordinator positions. *(Responsibility: Director of Residence Life. Implementation: September 2001. Completion target: May 2002.)*

Student Activities

- ◆ Focus the Programming resources on the lower level of the Roche Commons to promote a dynamic social and recreational space. Assessment of needs and resources for this area will be made. *(Responsibility: Director of Student Activities. Implementation: September 2001. Completion target: May 2002.)*
- ◆ Create student opportunities for leadership development and productive participation in self-governance and organizational development. New leadership program initiatives will be developed and assessed. . *(Responsibility: Director of Student Activities. Implementation: September 2001. Completion target: May 2002.)*
- ◆ Encourage self-directed activity that promotes self-realization and growth in individual social competency and group effectiveness. National studies and measurements will be sought for these areas. *(Responsibility: Director of Student Activities. Implementation: September 2001. Completion target: May 2002.)*
- ◆ Create and maintain collaboration with Academic Affairs to develop co-curricular initiatives. New staff position will develop program with Director of General Studies. *(Responsibility: Program Coordinator. Implementation: September 2001. Completion Target: May 2002.)*

Counseling and Testing Center - Director of Counseling Services

- ◆ Continue to improve clinical skills and awareness in order to meet the needs of an increasingly diverse Stonehill student population. The CTC clinical staff will take advantage of in-service training offered at the local, regional and national levels to refine their clinical skills in dealing with a diverse student body. *(Responsibility: Director of Counseling and Testing Services. Implementation: September 2001. Completion target: May 2002.)*
- ◆ Implement a Critical Incident Stress Management (CISM) training for appropriate campus personnel. Offer training in CISM to a selected group from the campus that will include students, faculty, staff and administrators. CISM represents an integrated, comprehensive, multicomponent, crisis intervention program spanning the complete crisis continuum.

(Responsibility: Director of Counseling and Testing Services. Implementation: September 2001. Completion target: May 2002.)

- ◆ Develop and coordinate a training program that will educate all residential students in issues of discrimination placing special emphasis on sexual harassment. Develop and implement an educational program entitled “Valuing Individuals: Sexual Harassment Discrimination Training, Title IX” that will teach student leaders to train their peers in understanding those attitudes and behaviors that characterize harassment and discrimination. *(Responsibility: Director of Counseling and Testing Services. Implementation: September 2001. Completion target: May 2002.)*

Intercultural Affairs

- ◆ Develop ways to increase staff support for Intercultural Affairs to service greater numbers of ALANA and international students. The College has approved a half-time administrative position that will be filled in FY 02-03. In the interim, the Office will continue to solicit internship support from Bridgewater State College and Stonehill College students electing international business careers. *(Responsibility: Director of Intercultural Affairs. Implementation: September 2001. Completion target: May 2002.)*
- ◆ Create programs to address retention issues related to ALANA and international students. Office will work jointly with Academic Advising to create mentoring program that will address the needs of students of color and international students. Develop an early warning network system to keep students of color and international students from falling between the cracks or flunking out. Continue to work with student leaders to develop the ALANA and International Orientation programs. *(Responsibility: Director of Intercultural Affairs. Implementation: September 2001. Completion target: May 2002.)*
- ◆ Provide leadership in the area of assessing diversity using appropriate outcomes based on strategic goals. Identify an in-house professional to assess Stonehill’s diversity efforts. Identify and train two people, on staff, to run Prejudice Reduction Workshops and eventually put the College in line to become a National Coalition Building Institute school affiliate. *(Responsibility: Director of Intercultural Affairs. Implementation: September 2001. Completion target: May 2002.)*
- ◆ Continue to serve as a liaison, resource and mentor between Student Affairs and Academic Affairs. Attend a summer institute with members of the faculty in June regarding Learning Communities. Inform the community of the outcomes established at the summer institute along with my colleagues. Continue to teach ED 170, 100-level course, to full-time and part-time students. *(Responsibility: Director of Intercultural Affairs. Implementation: September 2001. Completion target: May 2002.)*

Health Services

- ◆ To gain awareness of and implement the new HIPPA law. Related conference will be attended. *(Responsibility: Director of Health Services. Implementation: September 2001. Completion target: May 2002.)*
- ◆ To initiate a site visit to a college that has received accreditation to determine further consideration of this direction for Stonehill. A potential plan for Health Services accreditation will be established. *(Responsibility: Director of Health Services. Implementation: September 2001. Completion target: May 2002.)*

- ◆ To resolve legitimate office space needs to better accommodate students. Space request has been submitted, awaiting review by Space Committee. (*Responsibility: Director of Health Services. Implementation: September 2001. Completion target: May 2002.*)

Recreational Sports

- ◆ Completion and implementation of a long term risk management audit. (*Responsibility: Director of Recreational Sports. Implementation: September 2001. Completion target: May 2002.*)
- ◆ Continued development and expansion of group and individual fitness exercise programs, focusing on instructor certification and education as well as participant learning. (*Responsibility: Director of Recreational Sports. Implementation: September 2001. Completion target: May 2002.*)
- ◆ Renewed diligence and focus will be placed on patron and participant citizenship, in order to enhance positive program outcomes and experiences. This area will be reviewed, assessed and altered as necessary. (*Responsibility: Director of Recreational Sports. Implementation: September 2001. Completion target: May 2002.*)

VARSIY ATHLETICS

Introduction

The Strategic Plan of the Athletic Department is rooted in the belief that our present athletic affiliation within the Northeast-15 is inconsistent with the long-term interests and aspirations of the College. Within the past decade, Stonehill has measurably improved its academic profile, creating further qualitative differences between Stonehill and its conference affiliates, and more deeply exacerbating the competitive disadvantages that such academic differences necessarily produce. These significant academic and competitive differences between Stonehill and its conference colleagues have only deepened with recent conference expansion, which has added five new members, all of whom are ranked in the lower academic tier of conference members. Intercollegiate athletic competition promotes the name recognition of Stonehill in the wider community and in that community an institution without a long-standing academic identity tends to be known academically by the athletic company that it keeps. Therefore, if the College is to remain faithful to its stated mission of marking out a place among the nation's quality institutions of higher education, an affiliation with new conference brethren becomes both desirable and necessary.

Accordingly, the Department seeks to delineate the areas of improvement necessary, in the short term, for our athletic teams to be successful in the NE-15 Conference, and in the long term, to enable the College to position itself athletically so that, in concert with concomitant academic growth, the potential for movement to a more academically prestigious conference, whether in Division IAA or Division III, becomes both feasible and desirable. Ideally, this change in athletic identity would take place within the next five to seven years, depending on the financial resources available for new athletic and academic initiatives. Thus, although the stated objectives are operational in terms of addressing immediate needs, our aspirations for a change in athletic affiliation give these objectives long-term strategic implications. Through a combination of support from the operating budget and fund raising initiatives directed by the Director of Athletics and the Offices of the President and Advancement, the Department seeks to address the following student-athlete welfare and personnel support issues:

Student-Athlete Welfare Issues:

Provide institutional support for the fall pre-season camp. In 2001 it is projected that 200 athletes will be involved. The current cost is approximately \$37,000. *(To be implemented in two stages. In. Fall 2002 and Fall 2003.)*

Increase institutional support for meal money for away contests. Total cost of increase is approximately \$36,000. *(To be implemented during FY 2002 and FY 2003.)*

Through budgeted scholarship monies and significant fundraising, create a fund for targeted athletically-related aid that will allow for the successful recruitment of impact athletes. *(Timeframe: Ongoing.)*

Personnel Support:

Complete the second half of the salary adjustment for part-time coaches begun in FY 1999. Total cost is approximately \$31,000. *(To be accomplished FY 2002.)*

Institute salary adjustment for full-time professional staff. Total cost \$44,000; \$33,000 in FY 2003; \$11,000 in FY 2004.

Hire a full-time assistant football coach. *(FY 2002.)*

Provide institutional support for the portion of the salary and benefits of the full-time assistant men's basketball coach currently fundraised. Total cost \$17,000. *(To be implemented FY 2004.)*

Provide institutional support for the salaries of part-time men's and women's basketball coaches. Total cost \$12,000. *(To be implemented FY 2004.)*

Hire a part-time track coach to accommodate the growing number of student-athletes participating in this sport. Total cost \$6,000. *(To be implemented FY 2002.)*

Hire a part-time secretary to be assigned to augment the clerical staff. Total cost \$8,000. *(To be implemented FY 2002.)*

(Responsibility of P. Sullivan, Director of Athletics.)

ADVANCEMENT DIVISION

Mission

Our mission is to attract support and raise funds for Stonehill's advancement and to provide our constituencies with opportunities for involvement with the College. We do this by cultivating positive relationships and creating goodwill through alumni programs, development activities and communication strategies.

Alumni Objectives

The Alumni Office promotes and enhances relationships between alumni and the College. It offers a comprehensive annual calendar of events and Reunion Program. The Office supports an Alumni Council and maintains an alumni/constituent database; educates current students about their future role as alumni, and represents the views/interests of the alumni to the College.

- ◆ Our challenge is to increase the number of alumni who have a meaningful relationship with the College. We will provide opportunities for institutional involvement through programs, events and services, meeting alumni needs and fostering goodwill, especially through Alumni Ministry.

In alumni affairs, admissions, career services, academics, athletics, media relations and development, we will use alumni expertise more effectively. Therefore, we will develop a comprehensive volunteer management plan, offer a complete package of alumni events/services, and identify/utilize effective communication strategies.

We will evaluate our efforts by tracking the relationship of each alumnus/a by reviewing donor status, event attendance, volunteerism and meaningful contact with the College, and evaluating events/programs to gauge alumni satisfaction.

(Primary Responsibility: Director of Alumni Affairs.)

- ◆ We will promote the “alumni in residence” concept to students to ensure their involvement as alumni. We will do this by building a stronger Student Alumni Associations (SAA), and sponsoring student programs. To achieve this goal, we will enhance SAA efforts and investigate/implement new “alumni in residence” initiatives.

We will evaluate our efforts by tracking the relationship of each alumnus/a (especially former SAA members), by reviewing their donor status, event attendance, volunteerism and meaningful contact with the College, and measuring the interaction between alumni and current students.

(Primary Responsibility: Associate Director of Alumni Affairs.)

- ◆ We will maintain/update a database of constituent records to maximize communications and involvement. We will ensure accuracy of individual records, enhance/correct the database continually, and ensure proper usage of information for the benefit of on-campus groups. To achieve this goal, we will create a system of entry guidelines, devise additional data collection methods, improve management of current database, and expand database capabilities.

In an effort to ensure the integrity and usefulness of the alumni database, data collection will be enhanced through coordinated efforts with internal constituencies. The publication of an Alumni Directory in 2002 will present an opportunity to acquire current information from all alumni. An Alumni Census similar to the one done in 1992 will be conducted in 2003.

We will evaluate our efforts by measuring the number of “lost” alumni, charting the percentage of complete and accurate records, monitoring the money saved through correct mailing addresses, and tracking the time spent on research.

(Primary Responsibility: Director of Alumni Affairs.)

Development Objectives

The Development Office works to raise the Alumni and the Parents’ Funds. It orchestrates the Senior Class Gift Program and hosts special events such as the annual President’s Dinner and Founders’ Dinner. It researches and develops files on individuals, corporations and foundations. The Office solicits corporations and foundations and stewards gifts.

- ◆ Our challenge is to increase revenue from philanthropic activities so that reliance on tuition can be mitigated, the discount rate moderated, capital projects funded, and programs enhanced.

We must develop strategies to significantly increase the endowment (\$750,000 to \$1,000,000 annually) and the operating budget support for both unrestricted purposes (\$675,000 to \$1,000,000 annually) and for restricted/programmatic purposes (\$900,000 to \$1,200,000 annually) between FY02 and FY05.

Our goal is to increase Annual Fund and Major Gift initiatives to \$3,000,000 between FY02 and FY05. Therefore, we must stimulate alumni giving to levels above those of our benchmark colleges and within range of our aspirant colleges. We must devise more effective strategies for attracting significantly more major (\$100,000+) and special (\$25,000+) gifts.

(Primary Responsibility: Director of Development, Director of the Annual Fund.)

- ◆ Our goal is to increase annual Corporate, Foundation, and Government support to \$1,000,000 between FY02 and FY05. This will depend on the College setting priorities that lead to fundable programs matching our opportunities with corporate/foundation interests. We must then utilize more effectively alumni, trustee and other contacts to help us make our case. Internally, we will develop corporate mapping activities with the alumni and career services offices, internship coordinators, faculty and vendors.

(Primary Responsibility: Director of Development, Director of Government Relations.)

- ◆ We must expand our donor acquisition program, refine/improve our stewardship program, and review our volunteer management program. We must enhance our planned giving program and prepare for a new comprehensive capital campaign.

During the next 18-24 months, we will engage in a rigorous effort to organize a comprehensive capital campaign program. During this organizational phase, we need to address the following: the completion of a strategic plan, the development of a case statement, the testing of the case through a feasibility study, the creation of a donor pyramid through prospect identification, the recruitment of campaign leadership, the development of a plan and timetable, the strengthening of the Board of Trustees, the preparation of the President and other institutional leaders for their role as case makers and solicitors, and the training and development of staff.

(Primary Responsibility: F. Dillon, Vice President for Advancement.)

Media Relations and Communications Objectives

Media Relations and Communications will produce two issues of Stonehill Alumni Magazine each year, and work with the media/Campus Crossroads to promote Stonehill. They will implement a crisis response plan, maintain a hometown release program, and issue news releases/press kits for graduation/special events. They will respond to institutional mail, write presidential remarks, write citations and correspondence for the Advancement Division and the President. Major goals through 2005 are:

- ◆ Increase media awareness of Stonehill, publicizing the College and the achievements of faculty, students, alumni and administrators more assertively, while increasing the media's awareness of Stonehill as a source of expert opinion. We will define our media markets more precisely and target them accordingly.

(Primary Responsibility: Assistant Director for Media Relations.)

- ◆ Improve internal communications. While much of our energy is externally directed, we will improve the quality/frequency of internal communications. Rectifying this situation demands a shift in emphasis/resources and an action plan to improve internal dialogue.

(Primary Responsibility: Assistant Director for Media Relations.)

- ◆ Insure that the College's internal and external web image and presence reflects excellence and innovation consistent with Stonehill's standards and institutional goals. The initial focus will be on continued improvement of the look, feel, and navigation of our external site as well as increased capabilities, functionality, and new technology for our internal site. These efforts concerning our "electronic presence" will reach a milestone by 2005 with a major redesign of the look and feel of our web site marking the completion of the first cycle of Stonehill's electronic presence in the 21st century.

(Primary Responsibility: Web Administrator.)

- ◆ Develop new strategies to benefit the new President's profile. The President has to play a key role in developing Stonehill's public profile. We will develop fresh strategies for using him to advance the College's educational mission.

(Primary Responsibility: Director of Communications and Media Relations.)

- ◆ Develop and implement a College-wide Image Building Program. The College needs to formulate a long-term institutional image building plan, one that will develop strong and clear messages outlining Stonehill's academic strengths and its role in the larger community. The plan will serve to define and enhance the College's public profile. Key personnel from College Relations, Academic Division, Admissions, Campus Ministry, Athletics, and Student Affairs will be involved in the creation of the plan, which will unfold in light of the agreed strategic planning objectives.

(Primary Responsibility: Director of Communications and Media Relations.)