

# UNIVERSITY *of* SAINT MARY

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## **STRATEGIC PLAN** **OCTOBER 2006**

# UNIVERSITY OF SAINT MARY STRATEGIC PLAN

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# **UNIVERSITY OF SAINT MARY STRATEGIC PLAN**

## **EXECUTIVE SUMMARY**

### **MISSION STATEMENT**

The University of Saint Mary educates students of diverse backgrounds to realize their God-given potential and prepares them for value-centered lives and careers that contribute to the well being of our global society.

### **STRATEGIC FOCUS STATEMENT**

The University of Saint Mary will realize its mission by developing a regionally recognized nursing program, building on its liberal arts foundation, with the introduction of program and strategic partnerships in allied health, and foster financial stewardship to further promote and enhance its reputation of academic excellence.

As the University of Saint Mary (USM) neared completion of the strategic plan adopted in 2003, a new strategic planning process was undertaken in the fall of 2005. A Strategic Planning Committee (SPC) was formed, with representatives from each internal stakeholder group, to begin development of a new strategic plan. The strategic plan is now complete and has reaffirmed the current mission statement and produced a new vision statement. The plan will provide a strategy for USM for the next five year period.

This report will summarize each key step in the creation of the strategic plan. The SPC followed a fairly standard planning process with one notable exception: the development of a vision statement, generally occurring early in the process, was intentionally delayed until well into the planning process. This was done so that the SPC could ensure the vision statement addressed the strategic issues raised during the process.

To the extent possible, the planning process was data-based. Throughout the development of the plan, where possible, data were gathered and analyzed. The SPC learned a great deal about USM and the higher education industry and found this to be well worth the effort in making data based decisions. The university community now has a better sense of the challenges facing us and how best to meet those challenges.

A lack of focus for USM was a constant and recurring theme throughout the planning process. Accordingly, the SPC was deliberate in determining the most critical issues facing USM and limited the plan to address only the top two issues. However, by focusing the plan in these areas, the SPC does not mean to imply that all other programs of USM were ignored or are to be ignored during the design and implementation of the plan. Rather, the SPC recognizes the importance of focus at this time in USM's history. The SPC believes there are opportunities for

the entire USM's community to participate in the implementation of the plan. The plan is built upon the two strategic issues identified in the early stages of the planning process. Therefore, the plan focuses on two key strategic initiatives: Allied Health Programs and Improving Fiscal Stability. Action plans were developed to implement these two initiatives.

Each action plan contains several action steps, completion of which will begin to meet the vision. Those steps are organized into the two areas of allied health and fiscal stability. As with the planning process, the SPC felt the need to use data-based decision making in the development of the action steps and related metrics. In formulating some of the action steps, the SPC found the university lacked the necessary data to establish meaningful metrics. In other words, while the SPC could determine action steps, it was often difficult to determine an appropriate metric that wasn't arbitrary or based on wishful thinking. Therefore, many of the action steps involve the gathering of data including historical results, trends, and benchmarks. Once analysis of the data is complete, additional action steps may be developed to address the particular issue and specific achievable metrics could then be set.

Accordingly, the SPC anticipates the continued meeting of the committee to monitor, track, and evaluate the outlined action steps and to formulate additional action steps, with more definitive metrics, for the duration of plan implementation.

The SPC would like to thank all who participated throughout the planning process and looks forward to the successful implementation of this strategic plan.

# UNIVERSITY OF SAINT MARY STRATEGIC PLAN

## BACKGROUND

### The Origin

The University of Saint Mary (USM) last completed a strategic plan in June 2003. Many of the objectives set out in the strategic plan were met. For example, USM completed the transition to a university, implemented cutting edge undergraduate applied liberal arts curriculum, grew the endowment and improved facilities. The plan outlined action steps covering a three year period anticipating an end to the plan during 2006.

In the fall of 2005, the USM Administrative Council determined the need to begin the process to develop a new strategic plan to carry the university beyond 2006. A comprehensive strategic plan would integrate our mission with new strategies and action plans resulting in a clearly defined and innovative institutional vision for the next five years. The timing of this strategic plan is critical as USM faces several challenges in the near future. USM's current and forecasted financial results reflect a continued struggle for fiscal stability. The strategic planning process resulted in a blueprint we can begin to use to successfully bring stability to the university over the next five years. Specifically, this plan provides for the accumulation of information in several key areas. This data will be analyzed and will inform the decision process which will then drive the university to achieve its vision. This data-based process will also facilitate the monitoring, tracking and evaluation of the steps completed during implementation.

### Forming the Team

A Strategic Planning Committee (SPC) was formed comprising the following members:

Irma Napoli, Chair	Chuck McCann	Sr. Maureen Hall
Sr. Diane Steele	Dale Culver	Keith Hansen
Ron Logan	Sandra Van Hoose	Molly Sirridge
Sr. Susan Chase	Kevin Gantt	Gretchen Wilbur
Sharrilyn Honacki		

These individuals represent members from the Board of Trustees, Administrative Council, faculty, staff and the Overland Park Campus.

In addition, USM retained the services of Therese Horvat from WTGG Consulting, L.L.C. to facilitate the strategic planning process. The SPC's first meeting was held on October 21, 2005.

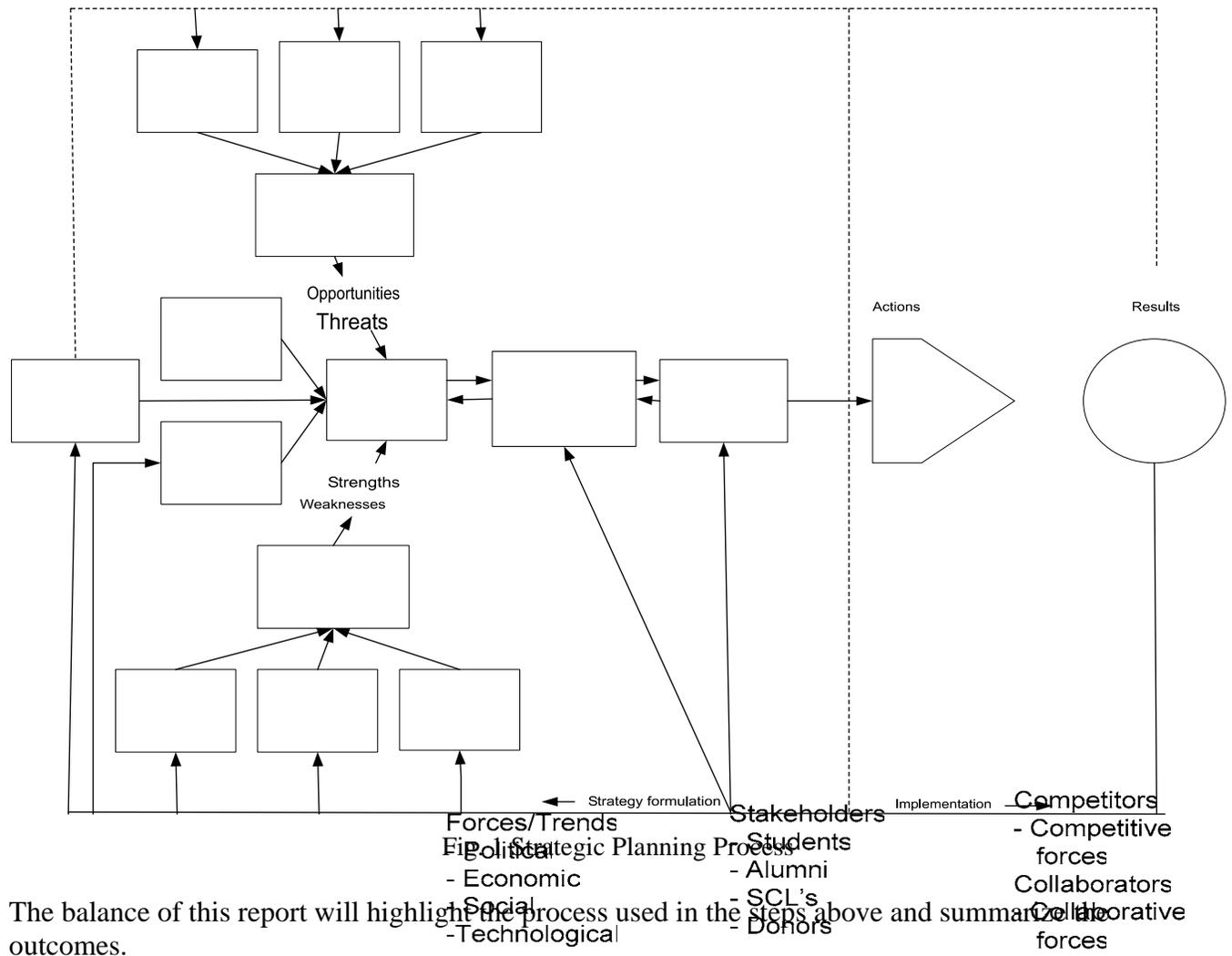
The SPC met on a regular basis and was involved in every aspect of the strategic plan development. Members also completed individual research and provided data to the SPC throughout the process. The SPC also sought input from the Board of Trustees and the entire

USM community at key points in the planning process. Regular progress reports were provided to the Board and community throughout the plan development.

### The Process

The SPC agreed to use a fairly standard approach to strategic planning with one exception. Generally once a Mission statement is established, the next step in the process is to develop a Vision statement. Both of these steps are usually completed early in the planning process *before* data are gathered and analyzed to determine strategic issues. However, the Committee felt the development of a Vision statement without data of the identification of strategic issues would lead to a predetermined outcome that would not fully address the challenges facing USM.

Therefore, the development of a Vision statement was purposefully delayed until after the identification of strategic issues. The planning process used by the Committee is shown in Figure 1 below:



The balance of this report will highlight the process used in the steps above and summarize the outcomes.

# UNIVERSITY OF SAINT MARY STRATEGIC PLAN

## MISSION STATEMENT

The University of Saint Mary educates students of diverse backgrounds to realize their God-given potential and prepares them for value-centered lives and careers that contribute to the well being of our global society.

*The University of Saint Mary takes its distinctive quality from a tradition of commitment to baccalaureate and graduate education which illumines and enlarges the mind and spirit and informs professional and moral actions; commitment to the Gospel and the person of Jesus Christ; and commitment to service. As a university it takes its evolving shape from timely and thoughtful response to needs. Thus it serves students of diverse ages, backgrounds, and religions in programs on and off campus.*

*The University of Saint Mary is informed by a liberal arts tradition. This statement reflects the longest and most distinguished tradition of American higher education. It represents a philosophy that life-long education is general and broad, rather than narrow and specialized. It is ultimately directed toward the good, the true, the beautiful; it is concerned with thought, understanding, judgment, and creativity. It frees us from ignorance, prejudice, and narrowness, and widens intellectual and spiritual horizons. It opens people to be, to act, to think, to work, to enjoy, and to create as more humane beings.*

*The University of Saint Mary holds also that a critical intelligence, depth and breadth of learning, and liberating aspects of the humanities and sciences are more important than ever in the diverse, interdependent, global society of the 21<sup>st</sup> century. Thus, Saint Mary's concept of applied liberal arts embraces the rich history and meaning of the liberal arts while intentionally connecting learning to the real world in concrete and practical ways. In this way, the liberal arts combine with active, experiential learning and career preparation so that students may use talents, knowledge, competencies, and energies to make a positive contribution in the world.*

### **The Process**

A mission statement clarifies an organization's purpose and creates an unrelenting and focused pursuit of important values and goals. In other words, why the organization should be doing what it does. It should drive all that work for USM in whatever way to devote their hearts and souls to hold its values and to achieve its goals. A mission statement connects both the present and the future of an organization.

The SPC began its work on a mission statement by reviewing our current mission statement, which was developed during the last strategic plan and implemented in the fall of 2003. Upon review, the SPC felt the existing mission statement, as it was recently developed and implemented, was still very relevant today for USM.

## **The Outcome**

Therefore, the SPC agreed to leave the current mission statement unchanged. The Board of Trustees agreed with this conclusion at their January 2006 meeting.

# UNIVERSITY OF SAINT MARY STRATEGIC PLAN

## STAKEHOLDERS

### The Process

Stakeholders are those individuals or groups who have a vested interest in USM. Stakeholders are both internal and external to USM. It is important to identify stakeholders to ensure their appropriate needs are identified and being met by USM.

Several selected members of the SPC attended an AQIP (Academic Quality Improvement Program) Strategy Forum in November 2005. As a part of the forum, our group, with the assistance of a facilitator, completed an exercise to identify USM's stakeholders. The exercise was comprehensive in scope and was well documented. Participating members shared the results with the rest of the university community for any comments or additional input.

### The Outcome

Stakeholders were identified as follows:

#### Internal stakeholders

Faculty  
Staff  
Board of Trustees

#### External stakeholders--Students

Traditional age undergraduate	High performing
Non-traditional age/adult undergraduate	Students who work in jobs 10-40 hours per week
Commuter	Transfer traditional undergraduate
Resident	Transfer Degree Completion
First generation	Graduate Students
First-time full-time	PT
Full-time other	FT
Part-time	Distance Learning
Physically Disabled	On-line
Learning Disabled	Regular Classroom
At Risk Other (psychological, social, physical)	Student Athletes
Minority	Non-Athlete students
Ethnic	High School or Dual Enrolled HS
Racial	Students who did not matriculate
Gender	Students who left
Sexual Orientation	Evening/Weekend undergraduates and graduate
International	Graduate and day adult students, Main
Underserved	Campus/Overland Park
Under prepared	

**External stakeholders—Other**

Sisters of Charity of Leavenworth  
SCL Members  
Governmental and Regulatory Bodies (i.e.  
USDE, CHEA, NCA HLC (AQIP), KSDE,  
IACBE, NCATE, State Legislature, US  
Congress)  
Business, Industry Sector  
NGO Sector  
Not-for-Profit Organizations  
Employers of USM graduates/students  
Donors and Contributors  
Transfer Institutions  
Catholic School System  
Area Public Schools

Partnerships/Professional Associations  
MACC  
KICA  
KCAC  
SCLHC/Nursing Scholarship Partners  
Pearson Achievement Solutions  
K-12  
Archdiocese/Catholic Churches  
Parents/families of students  
Alumnae  
Retirees/Emeritae  
Taxpayers  
Community/Neighbor

# UNIVERSITY OF SAINT MARY STRATEGIC PLAN

## MANDATES FOR SERVICES

### The Process

The SPC gathered data, including from the Environmental Scan (referenced in the following chapter) to assist in determining the mandates for USM’s services. Demographic indicators for both traditional and nontraditional students were reviewed. Probable majors and degrees earned both nationwide and at USM were identified. Factors impacting the changing work place, including the top fastest growing jobs and occupations with the largest anticipated job growth over the next several years, were obtained.

Several surveys were conducted of students dealing with such questions as why freshmen say they attend college, the importance of attaining outcomes and what attracted students to USM. Public opinion on important roles colleges perform and information on delivery methods was also gathered.

### The Outcome

The Committee summarized the mandates for services for USM as follows:

What undergrads want:	What adult learners want:	Job market needs:	Demographics—undergraduates—needs:	Demographics—adults, non-traditional, grad level—needs:
<ul style="list-style-type: none"> <li>▪ Career Preparation</li> <li>▪ Thinking Skills</li> <li>▪ College with good reputation for academics</li> <li>▪ A campus environment that appeals to them</li> <li>▪ Financial assistance/scholarships</li> <li>▪ Preparation for advanced degree work</li> <li>▪ Degrees in business, social sciences and education</li> </ul>	<ul style="list-style-type: none"> <li>▪ Career Enhancement</li> <li>▪ Opportunity to meet personal goals</li> <li>▪ Convenient Location</li> <li>▪ Multiple delivery methods</li> <li>▪ Fit with life and work schedules</li> <li>▪ Payment options</li> <li>▪ Degrees in education and business</li> </ul>	<ul style="list-style-type: none"> <li>▪ Allied health</li> <li>▪ Information technology</li> <li>▪ Education</li> <li>• Business</li> <li>▪ Creative problem-solving, team work</li> <li>▪ High level intellectual skills</li> <li>Technology and quantitatively literate</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fastest growing segment: those who have traditionally enrolled at lowest rates and encountered greatest barriers (low income, ethnically diverse)</li> <li>▪ Most high school students not prepared for college or work</li> <li>▪ Income differences have less impact on college enrollment rates of high school grads with high</li> </ul>	<ul style="list-style-type: none"> <li>▪ Higher the income level, the more likely person to participate in adult ed</li> <li>▪ Adult student enrollment approaching 50 percent</li> <li>▪ Almost three-fourths of undergrads are non-traditional</li> <li>▪ Adult student population increasing in actual numbers and as percentage of total enrollment</li> </ul>

			<ul style="list-style-type: none"> <li>test scores</li> <li>▪ 89 percent of Kansas high school graduates stay in state for college</li> <li>▪ 79 percent of undergrads receive some form of financial aid</li> <li>▪ Millennial generation will attend college to launch career</li> <li>▪ For Gen X parents of high school seniors: being financially well off an important goal</li> </ul>	
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Worth noting is the evidence students want career preparation and/or enhancement. In addition, among the needs in the job market were noted to be in the fields of allied health, information technology, education and business. USM currently offers programs in information technology, education and business and is just beginning a nursing program, which is within the allied health field.

# UNIVERSITY OF SAINT MARY STRATEGIC PLAN

## SWOT ANALYSIS

### The Process

SWOT analysis is an effective way of identifying the strengths (S) and weaknesses (W), and of examining the opportunities (O) and threats (T) the university faces. What makes it particularly powerful is with thought it can help us uncover opportunities advantageous to USM. Also by understanding our weaknesses, we can manage and eliminate threats that would otherwise catch us unaware. More importantly, by looking at USM and our competitors using the SWOT framework, we can craft a strategy that helps us compete successfully in our market.

The Committee spent a great deal of time and effort on this portion of the strategic plan. The Committee sought to have an informed, data based process. The current context and future projections for higher education continue to change and challenge institutions of higher education on several fronts, influenced by complex local, regional, and global forces and factors. Given these challenges, it is incumbent upon USM to ensure programs reflect the changing needs of the constituencies we serve while maintaining fidelity to the mission and values in providing a quality education. With this in mind, an environmental scan was performed with a significant amount of information gathered and summarized. The results of the Environmental Scan were studied by the Committee. In addition, the Environmental Scan was presented and reviewed, in some detail, by USM faculty and staff for a full day during the Spring Institute held in January 2006. The result of this effort was to draw conclusions from the data found in the Environmental Scan. These conclusions were grouped into the following areas:

- Higher education in general (who attends college and where?)
- Expenses, revenue, financial aid
- Attitudes and characteristics of freshmen at USM
- Public opinion and national surveys
- Trends in adult education
- Population projections
- ACT evaluation and surveys
- Anecdotal survey and satisfaction indicators
- Overland Park Campus surveys
- Competition
- Higher Education industry articles

Further, conclusions in the above areas were divided into internal (i.e. USM) environment factors and external environment factors.

Also, summaries of the Environmental Scan were provided to the Board of Trustees and the SCL Council for their review.

A SWOT analysis was conducted in three separate forums. The Board provided input during the October 2005 meeting. After reviewing the Environmental Scan, the USM community completed a SWOT analysis during the 2006 Spring Institute. In addition, the SCL Council completed a SWOT analysis. In each instance, committee members, along with the consultant, facilitated the analysis.

In the conduct of the SWOT analysis the following questions were presented:

*Strengths:*

- What advantages does USM have?
- What does USM do well?
- What relevant resources does USM have access to?
- What do other people see as our strengths?

*Weaknesses:*

- What could USM improve?
- What does USM do badly?
- What should USM avoid?

*Opportunities:*

- Where are the good opportunities facing USM?
- What are the interesting trends you are aware of?

*Threats:*

- What obstacles does USM face?
- What is our competition doing?
- Are the required specifications for our products or services changing?
- Is changing technology threatening our position?
- Do you have cash-flow problems?
- Could any of your weaknesses seriously threaten our business?

As shown on the Strategic Planning Process flowchart (Chapter II., Figure 1), internal environmental factors drawn from the Environmental Scan assisted in determining strengths and weaknesses. Likewise, external environmental facts from the scan also assisted in determining opportunities and threats.

Once the various SWOT analyses were completed, items identified in each area were compiled and summarized. The resulting list was lengthy and extensive, so the SPC determined the need

to prioritize the most critical factors in each area to a manageable few. The SPC presented the summarized list to the USM community and invited input asking everyone to indicate what they believe to be the three most critical factors in each area of the SWOT analysis. The results were reviewed by the SPC and the SWOT analysis results were narrowed down to a few critical items.

## **The Outcome**

The result of the SWOT analysis, after narrowing the number of identified items to a critical few is as follows:

### *Strengths*

- USM delivers an excellent education
- Academics at USM are progressive
- The curriculum blends professional and career preparation with liberal arts
- Faculty and staff are of high quality, competent
- Relationship with SCLs, heritage, mission, USM culture

### *Weaknesses*

- USM lacks enrollment; has challenges with retention
- USM has limited financial resources and revenue; needs to strengthen fund-raising
- USM lacks focus
- Employee welfare

### *Opportunities*

- Identify a niche; focus resources and exploit once this occurs
- Identify and pursue new target audiences and markets with different delivery models, sites and locations
- Focus on current and new curricular initiatives, using emerging delivery methods
- Target non-traditional students
- Develop partnerships with businesses, other constituents

### *Threats*

- Competition—other universities, colleges; delivery methods
- Student expectations of facilities and resources
- Inadequate funding sources (e.g., foundations, donors, declining federal funds)
- Rising costs

# UNIVERSITY OF SAINT MARY STRATEGIC PLAN

## STRATEGIC ISSUES

### The Process

At this point in the planning process, the SPC had reaffirmed the Mission statement, identified USM stakeholders, determined the mandate for services and completed an extensive SWOT analysis. The SPC's next step was to define the strategic issues arising from the work completed to date. The SPC listed several key strategic issues supported by the available data.

A recurring theme the SPC heard throughout the planning process was that USM was trying to do too much with too little or that there was a lack of focus in the direction USM is headed. Given the limited resources available and the five year time frame for the implementation of the strategic plan, the SPC decided to narrow the strategic issues down to two or three key issues. The SPC felt this would result in a manageable plan.

### The Outcome

The SPC narrowed the strategic issues to two critical points. First, *USM lacks focus*. The Committee felt USM must identify and capitalize upon a strategic focus and define a niche. The following questions needed to be answered in order to fully understand this strategic issue:

- What is our niche?
- What are our “centers of excellence”?
- Whom do we serve? What do students want?
- How do we deliver higher education?
- Where do we deliver higher education?
- What can we do/offer that will make traditional students choose to attend USM rather than Avila or other Catholic colleges/universities in the area and the state?
- What can we do/offer that will make adult and graduate students choose to attend USM rather than our competitors?

The second critical strategic issue is *USM is challenged by limited resources*. The Committee felt USM must correct our financial instability. Our financial instability is caused by several factors. The Committee highlighted those related to insufficient revenue from students and some of the more serious issues related to USM's limited resources as follows:

- Relevant to students:
  - Insufficient enrollment
  - Retention issues
  - Lack of academic preparation among undergraduates

- Middle and low income students unable to afford private education at USM
- Relevant to limited resources:
  - Inability to provide competitive salaries and benefits, staff recognition
  - Deferred maintenance
  - Insufficient fund development
  - Insufficient endowment

# UNIVERSITY OF SAINT MARY STRATEGIC PLAN

## STRATEGIC INITIATIVES

### The Process

With the identification of strategic issues completed, the Committee needed to develop the strategic initiatives necessary to address the issues. Strategic initiatives also provided the framework from which action plans would be developed to carry out these initiatives. As the Committee considered possible alternatives, the following criteria were used to ensure the initiatives were viable for USM:

- Fit with Mission
- Fit with Mandates for Services
- Fit with USM strengths and opportunities
- Required resources available
- Financial stability improved

### The Outcome

To address the strategic issue “*USM lacks focus*”, the first strategic initiative is:

***USM will develop allied health, starting with nursing, as a niche for which the university will be recognized***

To address the second strategic issue, “*USM is challenged by limited resources*”, the second, broader strategic initiative is:

***USM will improve its financial stability through revenue enhancement, fund development and cost containment.***

# UNIVERSITY OF SAINT MARY STRATEGIC PLAN

## STRATEGIC FIVE-YEAR FOCUS STATEMENT

The University of Saint Mary will realize its mission by developing a regionally recognized nursing program, building on its liberal arts foundation, with the introduction of program and strategic partnerships in allied health, and foster financial stewardship to further promote and enhance its reputation of academic excellence.

### **The Process**

As previously noted, the development of the vision statement was not undertaken until most of the research, data gathering and analysis had been completed. With this information the SPC identified the strategic issues and initiatives. Only after this point did work begin on the development of the strategic focus statement.

A strategic focus statement differs from a mission statement. As stated in the prior chapter, a mission statement connects both the present and the future. A good strategic focus statement is not true in the present. Rather, the strategic focus statement connects only to the future.

A good strategic focus statement should expand our mission into a “vision of success”. It should answer the question, “If USM successfully carries out its vision, what would be the result?”. The SPC wanted to develop a strategic focus statement which would narrowly focus the energies and resources of USM in its vision of success for the next five year period. In addition, upon successful completion of the strategic plan, the strategic focus statement could well change significantly for the term of the subsequent strategic plan.

### **The Outcome**

The SPC prepared a draft strategic focus statement which reads as follows:

“The University of Saint Mary will realize its mission through regional recognition for its nursing program, build synergy with the introduction of program and strategic partnerships in Allied health, and foster financial stewardship to further promote and enhance its reputation of academic excellence.”

The Committee presented the draft strategic focus statement to the Board at the June 2006 meeting. Concerns were voiced over the lack of reference to the liberal arts curriculum at the core of our education at USM within the strategic focus statement.

The SPC reviewed the concerns expressed at the Board meeting and reviewed the process used in the development of the draft strategic focus statement. The draft strategic focus statement was not intended to exclude or ignore our liberal arts core. The SPC understands the focus of building the allied health curriculum would be done while continuing to maintain a solid applied liberal arts core.

The SPC also wanted to expressly follow the concepts of visioning, referenced above, and focus on producing a vision which is not true in the present. Referring to our existing strong liberal arts core would not meet this criterion.

Therefore, the SPC approved the following strategic focus statement: “The University of Saint Mary will realize its mission by developing a regionally recognized nursing program, building on its liberal arts foundation, with the introduction of program and strategic partnerships in allied health, and foster financial stewardship to further promote and enhance its reputation of academic excellence.”

# UNIVERSITY OF SAINT MARY STRATEGIC PLAN

## ACTION PLANS

### **The Process**

The SPC formed two subcommittees to formulate action steps necessary to implement the strategic initiatives.

The allied health subcommittee developed criteria for potential programs. Those criteria include: Market & Competition, Clinical Space, Partners, Startup Costs, Return on Investment, Accreditation, Equipment/Lab and Faculty availability.

The fiscal stability subcommittee constructed an action plan to improve financial stability integrating finances, academic programs, student life, admissions/marketing and administrative services. Successful implementation of the action plan steps will provide the resources necessary to accomplish our mission and ensure our financial viability for the future. Within the context of both external and internal realities, the action steps include program and operations analyses which will drive data based decision-making following a comprehensive approach, balancing resource and trend analysis criteria with curricular, cultural, and mission-related considerations. Key areas in the action plan include: Fiscal Planning & Policies, Budget, Revenues, Enrollment/Marketing, Student Life, Academic Programs, Overland Park Campus and Administrative Services & Governance.

### **The Outcome**

Several of the resulting action steps in the strategic plan are focused on the gathering and analysis of data. In determining specific actions steps, with measurable results, the Committee found a lack of comprehensive and accurate data, including internal and external trends and benchmarks, making it difficult to develop meaningful action steps with specific goals. In other words, while the Committee could determine some data with existing systems, it was left with an incomplete picture as to what a reasonable potential for improvement could be in most areas identified. Therefore, many of the action steps are of a data gathering and analysis nature. For example, for Allied Health data was gathered to identify potential programs. The action steps outline the steps necessary to develop a comprehensive business plan. The business plans, if approved, for each program would then establish metrics to determine the progress made in each approved program. Once each of these steps are complete, the University would be in a position, after analysis, to take the plan to the next level and determine where additional action steps would be needed to carry out the strategic initiatives.

The following are the Allied Health Action Steps and the Fiscal Stability Action Steps.

**ALLIED HEALTH**  
**Action Steps**

**ESTABLISH A DEGREE IN HEALTHCARE INFORMATICS**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>Phase 1 Study</b></p> <p><b>A. Determine Feasibility</b></p> <ul style="list-style-type: none"> <li>• External needs analysis               <ul style="list-style-type: none"> <li>a. Local</li> <li>b. SCLHS</li> <li>c. Clinical capacity</li> <li>d. Faculty available</li> <li>e. Financial Resources available</li> </ul> </li>   <li>• Internal capacity analysis               <ul style="list-style-type: none"> <li>a. Space – Remodeling cost?</li> <li>b. Lab Cost?</li> <li>c. Ongoing equipment cost</li> <li>d. Infrastructure capacity</li> <li>e. Library cost</li> <li>f. Marketing cost</li> </ul> </li> </ul>	<p>VPAA, Director of IT</p> <p>Director of IT w/VPAA</p>	<p>9/1/06</p> <p>9/1/06</p>		<p>Ongoing research, much completed Presented to SP Allied Health Committee Current faculty (2 FT) and the addition of two adjuncts are needed for the start. As specialized courses are added, other adjuncts (at possibly a higher pay rate) will be needed. Office supplies are estimated at \$500 per year The current classroom space allocated for IT is sufficient at this time Since many of the required courses are shared between the IT major and the HCI major, we can handle the additional load in the near term The department currently has 15 laptops to support students who are not issued laptops. This should handle the additional load. These of course would need to be kept current on the same scale as other systems. Our current classroom can accommodate 25 students. Most materials are readily available online and library costs should be minimal.</p>
<b>B. Determine Regulatory</b>	VPAA	9/1/06		Not for UG Informatics

**ALLIED HEALTH  
Action Steps**

<b>Demands</b> <ul style="list-style-type: none"> <li>• Accreditation</li> <li>• State</li> <li>• AQIP</li> <li>• USM Governance</li> </ul>	w/Director of IT	9/12/06		Faculty Senate Scheduled
<b>C. Develop 5 year draft Budget to demonstrate ROI</b>				The limited initial outlay and use of current courses, faculty and facilities make for a rapid return in a short period
<b>D. Establish Advisory Committee</b>	Director of IT			
<b>E. Determine when/if a consultant is needed</b>				A consultant is not needed at this time, but may be needed when we start the process of obtaining program certifications
<b>F. Create Gantt Chart with Capital outlay</b>	Director of IT w/VPAA	9/11/06		Business Plan – cost to maintain, upgrade, etc
<b>G. Complete Business Plan</b>		10/1/06		Plan presented to AC
<b>Phase 2 Development</b> <ul style="list-style-type: none"> <li>• Curriculum development</li> <li>• Remodeling</li> <li>• Labs</li> <li>• Relationships (clinical)</li> <li>• Ordering library books</li> </ul>	Director of IT w/VPAA	Fall 06		Approval by Senate and BOT in Fall 06 Identification of Healthcare faculty (adjunct) No remodeling or additional labs are needed at this time Since most of the courses are either part of the current USM GE or the IT major, only three courses will need development for the initial launch A key part of this program development should be to go online. In this vein, all courses needed will require development for the online system.
<b>Phase 3 Implement</b>		1/1/07		Done

**ALLIED HEALTH**

**Action Steps**

<b>Phase 4 Follow up</b>		9/30/09		Report to AC w/updated ROI
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**ALLIED HEALTH**  
**Action Steps**

**EXPLORE, STUDY AND DEVELOP DOCTORATE IN PHYSICAL THERAPY**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>Phase 1 Feasibility Study</b></p> <p><b>A. Determine Feasibility</b></p> <ul style="list-style-type: none"> <li>• External needs analysis               <ul style="list-style-type: none"> <li>a. Local</li> <li>b. SCLHS</li> <li>c. Clinical capacity</li> <li>d. Faculty available</li> <li>e. Financial Resources available</li> </ul> </li> <li>• Internal capacity analysis               <ul style="list-style-type: none"> <li>a. Remodeling cost?</li> <li>b. Lab cost?</li> <li>c. Ongoing equipment cost</li> <li>d. Infrastructure capacity</li> <li>e. Library cost</li> <li>f. Marketing cost</li> </ul> </li> <li>• Establish Advisory Committee</li> </ul>	<p>Assistant Professor in Nursing and Associate Professor in Biology</p>	<p>11/06</p>		<p>Done</p>
<p><b>B. Determine Regulatory Demands and Timeline for approval/accreditation</b></p> <ul style="list-style-type: none"> <li>• Accreditation</li> <li>• State</li> <li>• AQIP</li> <li>• USM Governance</li> </ul>				<p>Done</p>
<p><b>C. Develop 5 year draft Budget</b></p>				<p>Done</p>

**ALLIED HEALTH**  
**Action Steps**

<b>to demonstrate ROI</b>				
<b>D. Determine when/if a consultant is needed</b>				
<b>E. Create Gantt Chart with Capital outlay</b>				
<b>F. Complete Business Plan</b>		11/10/06		Plan presented to AC
<b>Phase 2 Decision to proceed or not</b>		1/30/07		Decision made to proceed.
<b>Phase 3 Development</b> <b>Develop Marketing Plan</b> <ul style="list-style-type: none"> <li>• Hire director/faculty as necessary</li> <li>• Establish Advisory Committee</li> <li>• Develop Curriculum <ul style="list-style-type: none"> <li>a. Remodel as necessary</li> <li>b. Develop Labs</li> <li>c. Establish Clinical Relations as necessary</li> <li>d. Order library books</li> </ul> </li> </ul>		2/28/07 3/30/07 3/30/07		Failed search for Director.  Committee established  On hold until Director hired.
<b>Phase 4 Launch</b>		8/08		On hold
<b>Phase 5 Follow up</b> <ul style="list-style-type: none"> <li>• Compare numbers against business plan</li> </ul>		8/09		Report to AC on ROI

**ALLIED HEALTH**  
**Action Steps**

**MSN/DNP**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>Phase 1 Study</b></p> <p><b>A. Determine Feasibility</b></p> <ul style="list-style-type: none"> <li>• External needs analysis               <ul style="list-style-type: none"> <li>a. Local</li> <li>b. SCLHS</li> <li>c. Clinical capacity</li> <li>d. Faculty available</li> <li>e. Financial Resources available</li> </ul> </li> <li>• Internal capacity analysis               <ul style="list-style-type: none"> <li>a. Space – Remodeling cost?</li> <li>b. Lab cost?</li> <li>c. Ongoing equipment cost</li> <li>d. Infrastructure capacity</li> <li>e. Library cost</li> <li>f. Marketing cost</li> </ul> </li> <li>• Establish Advisory Committee</li> </ul>	Dean of Nursing	8/20/06 Start Date		On hold due to change of personnel in Nursing Department.
<p><b>B. Determine Regulatory Demands and Timeline for approvals</b></p> <ul style="list-style-type: none"> <li>• Accreditation</li> <li>• State</li> <li>• AQIP</li> <li>• USM Governance</li> </ul>				

**ALLIED HEALTH**  
**Action Steps**

<b>C. Develop 5 year draft Budget to demonstrate ROI</b>				
<b>D. Determine when/if a consultant is needed</b>				
<b>E. Create Gantt Chart with Capital outlay</b>				
<b>F. Complete Business Plan</b>		10/1/09		Present plan to AC
<b>Phase 2 Decision to proceed or not</b>		11/20/09		Decision made
<b>Phase 3 Development</b> <b>Develop marketing plan</b> <ul style="list-style-type: none"> <li>• Curriculum development</li> <li>• Remodeling</li> <li>• Labs</li> <li>• Relationships (clinical)</li> <li>• Ordering library books</li> </ul>				
<b>Phase 4 Implementation/Launch</b>		8/10/09		
<b>Phase 5 Follow up</b>		8/10/10		Report to AC on ROI

**ALLIED HEALTH**  
**Action Steps**

**HEALTHCARE INFORMATION MANAGEMENT**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>Phase 1 Study</b></p> <p><b>A.. Determine Feasibility</b></p> <ul style="list-style-type: none"> <li>• External needs analysis               <ul style="list-style-type: none"> <li>f. Local</li> <li>g. SCLHS</li> <li>h. Clinical capacity</li> <li>i. Faculty available</li> <li>j. Financial Resources available</li> </ul> </li> <li>• Internal capacity analysis               <ul style="list-style-type: none"> <li>f. Space – Remodeling cost?</li> <li>g. Lab cost?</li> <li>h. Ongoing equipment cost</li> <li>i. Infrastructure capacity</li> <li>e. Library cost</li> <li>f. Marketing cost</li> </ul> </li> <li>• Establish Advisory Committee</li> </ul>	<p>Director of IT/VPAA</p>	<p>11/10/07 Start Date</p>		<p>The feasibility study has been delayed because of personnel assignment changes. The new deadline is October 15, 2008.</p>
<p><b>B. Determine Regulatory Demands and Timelines for approval</b></p> <ul style="list-style-type: none"> <li>• Accreditation</li> <li>• State</li> <li>• AQIP</li> <li>• USM Governance</li> </ul>				

**ALLIED HEALTH**  
**Action Steps**

<b>C. Develop 5 year draft Budget to demonstrate ROI</b>				
<b>D Determine when/if a consultant is needed</b>				
<b>E Create Gantt Chart with Capital outlay</b>				
<b>F Complete Business Plan</b>		1/05/09		Plan presented to AC
<b>Phase 2 Decision to proceed or not</b>		1/30/09		Decision made
<b>Phase 3 Development</b> <ul style="list-style-type: none"> <li>• Curriculum development</li> <li>• Remodeling</li> <li>• Labs</li> <li>• Relationships (clinicals)</li> <li>• Ordering library books</li> </ul>				
<b>Phase 4 Launch</b>		8/08		
<b>Phase 5 Follow up Report</b>		8/09		Report to AC w/updated ROI

**ALLIED HEALTH**  
**Action Steps**

**DIETICS and NUTRITION**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>DIETICS and NUTRITION</b></p> <p><b>Phase 1 Study</b></p> <p><b>A. Determine Feasibility</b></p> <ul style="list-style-type: none"> <li>• External needs analysis               <ul style="list-style-type: none"> <li>a. Local</li> <li>b. SCLHS</li> <li>c. Clinical capacity</li> <li>d. Faculty available</li> <li>e. Financial Resources availability</li> </ul> </li> <li>• Internal capacity analysis               <ul style="list-style-type: none"> <li>a. Space – Remodeling cost?</li> <li>b. Lab Cost?</li> <li>c. Ongoing equipment cost</li> <li>d. Infrastructure capacity</li> <li>e. Library cost</li> <li>f. Marketing cost</li> </ul> </li> <li>• Establish Advisory Committee</li> </ul>	VPAA	11/10/10 Start Date		
<p><b>B. Determine Regulatory Demands</b></p> <ul style="list-style-type: none"> <li>• Accreditation</li> <li>• State</li> <li>• AQIP</li> </ul>				

**ALLIED HEALTH**  
**Action Steps**

• USM Governance				
<b>C. Develop 5 year draft Budget to demonstrate ROI</b>				
<b>D Determine when/if a consultant is needed</b>				
<b>E Create Gantt Chart with Capital outlay</b>		12/20/10		
<b>F Complete Business Plan</b>		1/30/10		
<b>Phase 2 Decision to proceed or not</b>		2/1/10		
<b>Phase 3 Development</b> <ul style="list-style-type: none"> <li>• Curriculum Development</li> <li>• Remodeling</li> <li>• Labs</li> <li>• Relationships (clinicals)</li> <li>• Ordering library books</li> </ul>		8/1/11		
<b>Phase 4 Launch</b>		8/1/11		
<b>Phase 5 Follow up</b>		9/30/12		Report to AC w/update ROI

**ALLIED HEALTH**  
**Action Steps**

**OCCUPATIONAL THERAPY**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>Phase 1 Feasibility Study</b></p> <p><b>A. Determine Feasibility</b></p> <ul style="list-style-type: none"> <li>• External needs analysis               <ul style="list-style-type: none"> <li>a. Local</li> <li>b. SCLHS</li> <li>c. Clinical capacity</li> <li>d. Faculty available</li> <li>e. Financial Resources available</li> </ul> </li> <li>• Internal capacity analysis               <ul style="list-style-type: none"> <li>a. Space – Remodeling cost?</li> <li>b. Lab Cost?</li> <li>c. Ongoing equipment cost</li> <li>d. Infrastructure capacity</li> <li>e. Library cost</li> <li>f. Marketing cost</li> </ul> </li> </ul>		8/09 Start Date		<p>Feasibility study completed.</p> <p>Found that existing programs were not at capacity. Decided not to proceed.</p>
<p><b>B. Determine Regulatory Demands and Timeline for approval</b></p> <ul style="list-style-type: none"> <li>• Accreditation</li> <li>• State</li> <li>• AQIP</li> <li>• USM Governance</li> </ul>				
<p><b>C. Develop 5 year draft Budget to demonstrate ROI</b></p>				

**ALLIED HEALTH  
Action Steps**

<b>D. Determine when/if a consultant is needed</b>				
<b>E. Create Gantt Chart with Capital outlay</b>				
<b>F. Complete Business Plan</b>		12/1/09		
<b>Phase 2 Decision to proceed or not</b>		1/30/10		
<b>Phase 3 Development</b> <ul style="list-style-type: none"> <li>• Hire director/faculty as necessary</li> <li>• Establish Advisory Committee</li> <li>• Develop Curriculum <ul style="list-style-type: none"> <li>a. Remodel as necessary</li> <li>b. Develop Labs</li> <li>c. Establish Clinical Relations as necessary</li> <li>d. Order library books</li> </ul> </li> </ul>		2/1/10		
<b>Phase 4 Launch</b>		8/1/11		
<b>Phase 5 Follow up</b>		8/1/12		Report to AC w/updated ROI

**ALLIED HEALTH**  
**Action Steps**

**RE-DESIGN ONLINE OFFERINGS**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<b>Phase 1 Initial Study</b>	Dean, OPC	11/1/06		
<b>A. Establish Criteria</b>				
<b>B. Rank Possible offerings by criteria</b>		11/1/06		
<b>C. Develop Draft Calendar</b>		11/1/06		
<b>Phase 2 Feasibility for Each Program/Courses</b>  <b>Phase 1 Feasibility Study for Each Degree</b>  <b>A. Determine Feasibility</b> <ul style="list-style-type: none"> <li>• External needs analysis               <ul style="list-style-type: none"> <li>a. Local</li> <li>b. SCLHS</li> <li>c. Clinical capacity</li> <li>d. Faculty available</li> <li>e. Financial Resources availability</li> </ul> </li> <li>• Internal capacity analysis               <ul style="list-style-type: none"> <li>a. Space – Remodeling cost?</li> <li>b. Ongoing equipment cost</li> <li>c. Infrastructure capacity</li> <li>d. Personnel</li> <li>e. Marketing cost</li> </ul> </li> </ul>	Online Program Director	1/30/07		Project completed with two degrees:  MAT RN – BSN  Entered into partnership with COMPASS.

**ALLIED HEALTH  
Action Steps**

<b>B. Determine Regulatory Demands</b> <ul style="list-style-type: none"> <li>• Accreditation</li> <li>• State</li> <li>• AQIP</li> <li>• USM Governance</li> </ul>				
<b>C. Develop 5 year draft Budget to demonstrate ROI</b>				
<b>D. Determine when/if a consultant is needed</b>				
<b>E. Create Gantt Chart with Capital outlay</b>				
<b>F. Complete Business Plan</b>				
<hr/> <b>Phase 2 Decision to proceed or not</b>	<hr/>	<hr/>	<hr/>	<hr/>
<b>Phase 3 Development</b> <ul style="list-style-type: none"> <li>• Hire director/faculty as necessary</li> <li>• Establish Advisory Committee</li> <li>• Develop Curriculum               <ul style="list-style-type: none"> <li>a. Remodel as necessary</li> <li>b. Develop Labs</li> <li>c. Establish Clinical Relations as necessary</li> <li>d. Order Library books</li> </ul> </li> </ul>				

**ALLIED HEALTH**  
**Action Steps**

**PROFESSIONAL DEVELOPMENT IN HEALTHCARE**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<b>Phase 1 Study</b>	Assistant Professor in Nursing Department			
<b>A. Initial development</b>		1/15/07		Report to AC w/ROI
<b>B. Explore extensive program development</b>		5/1/07		Canceled due to change in personnel.
<ul style="list-style-type: none"> <li>• Market</li> <li>• Setup cost</li> <li>• Sustainability</li> <li>• Internal Capacity</li> <li>• Online vs on ground</li> </ul>		5/15/07		
<b>C. Develop Business Plan w/5 year draft Budget &amp; ROI</b>		2/30/07		
<b>Phase 2 Decision to proceed or not</b>		6/15/2007		Decision made to cancel.
<b>Phase 3 Development</b>		9/1/07		
<b>Phase 4 Implementation</b>		9/10/07		
<b>Phase 5 Follow up</b>		9/10/08		Report to AC w/updated ROI

**ALLIED HEALTH**  
**Action Steps**

**DEVELOP PARTNERSHIPS**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<b>A. Expand and Develop Partnership with SCLHS</b>	Nursing	1/10/07		Status report due to AC
<b>B. Grow number of Nursing Scholarships</b>	Dean of Nursing	6/30/08		15 full time tuition scholarships 2010 3 as of Fall 2008 Due to changes in hospital personnel. Some agreements dropped.
<b>C. Develop Partnerships w/Cristo Rey Network</b>	President & Local Coordinator of Partnership w/Cristo Rey KC	5/30/07		Status report due to AC 25% of Cristo Rey KC Class of 2010 enroll at USM Signed formal partnership, 8/08.
<b>D. Explore other Partnerships</b>	Pres & VPAA	5/07		Exploring with Kansas City University of Medicine & Biosciences.

**FISCAL STABILITY**  
**Action Plan**

**FISCAL PLANNING & POLICIES**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>A. Establish a monitoring system for financial performance using ratios, trends, and benchmarks based on industry standards.</b></p> <ul style="list-style-type: none"> <li>• Identify appropriate Financial Performance Indicators for institutions similar in size and scope to USM</li> <li>• Calculate and compare USM financial information, including trends, with identified Financial Performance Indicators</li> <li>• Analyze results and identify areas of possible financial improvements</li> <li>• Conduct regular budget, financial condition, and financial strategy meetings to review goals and policies using appropriate financial ratios and trend analysis</li> </ul>	VPFAS	12/2006	Summary of Financial Performance Indicators	Improved Process for monitoring results—with financial monitoring process established will be able to benchmark: Monitor Final Results
	VPFAS	1/2007	Report of Indicators Comparison	Used CIC Kit—pre-made financial comparisons, national, regional, KCIA: Results
	VPFAS	2/2007	Report of areas of Financial Improvements	
	VPFAS	2/2007	Monthly agenda items for Admin Council Agenda item at each Finance Committee meeting	Tracking data: bond rating agency In Process
<p><b>B. Determine possible plans to eliminate deficits from operations</b></p> <ul style="list-style-type: none"> <li>• Develop scenarios and forecasts where revenues</li> </ul>	Admin Council	3/2007	Presentation to Finance Committee	In Process

**FISCAL STABILITY  
Action Plan**

equal expenditures and expenditures equal revenues				
<b>C. Develop a program to review the financial impact of all major areas of operations and programs.</b> <ul style="list-style-type: none"> <li>• Develop procedures to identify direct and indirect costs of major operations.</li> <li>• Determine methodology to allocate indirect costs to major operations and programs.</li> <li>• Prioritize operations to be reviewed. <ul style="list-style-type: none"> <li>a. Athletic Department</li> <li>b. Auxilliary Enterprises</li> </ul> </li> <li>• Develop calendar to schedule operational reviews.</li> <li>• Calculate total operating program costs and provide analysis including recommendations to improve fiscal impact.</li> </ul>	VPFAS	12/2006	Summary of direct and indirect costs for FYE2006	Results  Activity-Based Costing, presented to BOT, used for academic programs, athletic department
	VPFAS	1/2007	Documented methodology	
	Admin Council	1/2007	List of Major Operations	
	VPFAS	2/2007	Documented Calendar	
	VPFAS	4//2007 - ongoing	Report of cost of selected Major Operations for FYE 2006	
<b>D. Develop policies to begin to build cash reserves.</b> <ul style="list-style-type: none"> <li>• Commit to cash and short-term investment goals to equal a stated percentage of expenses</li> </ul>	Admin Council	5/2007 6/2007	Admin Council Approval Presentation to Finance Committee FYE 2008 Budgeted	All In Process

**FISCAL STABILITY**  
**Action Plan**

<ul style="list-style-type: none"> <li>Build capital investment and reinvestment funds for renovations, new program capital requirements and equipment replacement</li> </ul>	Admin Council	4/2008 6/2008	Surplus Admin Council Approval Presentation to Finance Committee FYE 2009 budget line item for long-term capital expenditures	Not feasible yet.
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**FISCAL STABILITY**  
**Action Plan**

**BUDGET**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>A. Improve fiscal management that strengthens budget controls by:</b></p> <ul style="list-style-type: none"> <li>• Tracking variances between actual and forecast revenue and expenses</li> <li>• Having a plan to deal with or resolve for significant variances (positive or negative)</li> <li>• Building revenue enhancement and expenditure control incentives</li> <li>• Revamping incentives when they fail to improve effectiveness</li> <li>• Building a contingency fund</li> </ul>	VPFAS	7/2007	Monthly report to Admin Council	In Process.
	VPFAS	7/2007		
	Admin Council	6/2008	Changes incorporated into FYE 2008 Budget	In Process: Supplemental Budget, must increase revenues
	Admin Council	6/2008	Changes incorporated into FYE 2008 Budget	In Process
	VPFAS	6/2008	Changes incorporated into FYE 2008 Budget	

**FISCAL STABILITY**  
**Action Plan**

**REVENUES**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>Focus strategy on main income flows in USM</b></p> <p><b>A. Tuition Revenues</b></p> <ul style="list-style-type: none"> <li>• Build a coherent net pricing strategy</li> <li>• Revise payment procedures to ensure accurate and timely recording and collection of tuition revenues.</li> <li>• Bill students monthly and enforce collection procedures.               <ul style="list-style-type: none"> <li>a. Set receivables and bad-debt goals.</li> </ul> </li> </ul>	<p>VPFAS</p> <p>Controller</p> <p>Controller</p> <p>VPFAS</p>	<p>1/2007</p> <p>1/2007</p> <p>1/2007</p> <p>1/2007</p>	<p>Documented strategy to Finance Committee</p> <p>Documented procedures for main and Overland Park campuses.</p> <p>Monthly bills and stated goals for receivables and bad debts</p> <p>Stated Goal</p>	<p>Results:</p> <p>Overtime comparisons, ERMS, controlling tuition discounting, collecting bills, 3 years comparison</p>
<p><b>B. Auxiliary Enterprises</b></p> <ul style="list-style-type: none"> <li>• Complete operational financial impact review as outlined in Fiscal Planning &amp; Policies Action Step C.</li> <li>• Require auxiliaries to achieve a net income minimum goal that covers direct expenses, depreciation, and fixed expenses from the</li> </ul>	<p>VPFAS</p> <p>VPFAS</p>	<p>3/2007</p> <p>6/2008</p> <p>8/2008</p>	<p>Report of analysis and review</p> <p>Goals built into FYE 2008 Budget</p> <p>Report on measurable results</p>	<p>Done</p> <p>In Process</p>

**FISCAL STABILITY  
Action Plan**

<p>university.</p> <ul style="list-style-type: none"> <li>• Reorganize or outsource auxiliaries, administrative services, or other operations that fail to meet financial goals</li> <li>• Explore alternative uses for fixed assets to generate additional revenue</li> </ul>	<p>VPFAS</p> <p>Task Force (TBA)</p>	<p>6/2008</p> <p>6/2007</p>	<p>Changes incorporated into FYE 2008 Budget</p> <p>Changes incorporated into FYE 2008 Budget</p>	<p>In Process</p> <p>Not feasible yet.</p>
<p><b>C. Development – Strengthen fundraising programs and activities and monitor results.</b></p> <ul style="list-style-type: none"> <li>• Increase revenues by: <ul style="list-style-type: none"> <li>a. Develop and implement plan to increase annual fund revenues</li> <li>b. Develop and implement plan to increase endowed funds <ul style="list-style-type: none"> <li>- Consider capital campaign to raise endowed scholarships for students with significant financial need</li> </ul> </li> <li>c. Develop and implement plan to raise funds for Allied Health programs</li> </ul> </li> </ul>	<p>VP for Development</p> <p>VP for Development</p> <p>VP for Development</p>	<p>10/2006</p> <p>6/2010</p> <p>1/2007</p> <p>3/2007</p>	<p>Completed plan presented to IA Committee</p> <p>\$1.0 million in Annual Fund Revenues</p> <p>Completed plan presented to IA Committee</p> <p>Completed plan presented to IA Committee</p>	<p>In Process</p> <p>Process: Capital Comparisons with b and c</p> <p>Done</p> <p>Done</p>

## FISCAL STABILITY

### Action Plan

<ul style="list-style-type: none"><li>• Monitor fundraising results<ul style="list-style-type: none"><li>a. Develop a set of performance indicators (e.g. cost to raise one dollar) and provide regular reports.</li></ul></li></ul>	VP for Development	2/2007	Report of Financial Indicators to IA Committee on a quarterly basis	Program in place with benchmarks.
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**FISCAL STABILITY  
Action Plan**

<b>B. Continue using and monitoring ERMS for financial aid program targeting preferred students</b>	Director of Financial Aid	11/2007, annually thereafter	Documented annual plan reviewed by VPFAS, presented to Admin Council	Done
<b>C. Eliminate as many obstacles to student admission and registration as possible</b> <ul style="list-style-type: none"> <li>• Review procedures for admissions and registration for Leavenworth Campus</li> <li>• Propose changes in procedures for approval</li> </ul>	Director of Admissions	12/2006	Report to Administrative Council	Done Continuing to monitor.
<b>D. Treat the student at customer</b> <ul style="list-style-type: none"> <li>• Customer service training</li> <li>• Annual surveys</li> </ul>	Director of Marketing	2/2007 5/2007	Plan to Admin Council Survey Results	Surveys, client/student satisfaction survey. AQIP project in place.
<b>E. Market the Allied Health niche for USM that will enhance its reputation</b>	Director of Marketing	6/2010	Marketing plan presentation	In Process
<b>F. Monitor admissions, enrollment, and financial aid campaigns</b> <ul style="list-style-type: none"> <li>• Establish performance indicators</li> <li>• Set Goals</li> <li>• Monitor results               <ul style="list-style-type: none"> <li>a. Admissions</li> <li>b. Financial Aid</li> </ul> </li> </ul>	Directors of: Admissions Financial Aid	10/2006 10/2006	Weekly and annual reports Weekly and annual reports	Measures, comparative benchmarks and data, internally and externally.  Done

**FISCAL STABILITY**  
**Action Plan**

**STUDENT LIFE**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>Student Retention</b></p> <p><b>A. Establish a program to minimize attrition</b></p> <ul style="list-style-type: none"> <li>• Review Retention Planning Process with Retention Committee</li> <li>• Develop Retention Goals and Metrics</li> <li>• Develop Retention Plan</li> <li>• Implement Retention Plan</li> <li>• Report Actual results against plan and stated goals</li> </ul>	<p>VPAA</p> <p>Retention Committee</p>	<p>10/31/2006</p> <p>2/28/2007</p>	<p>Report to Admin Council</p> <p>Report to Admin Council with stated Retention Goals</p>	<p>In Process</p>

**FISCAL STABILITY  
Action Plan**

**STUDENT LIFE**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>Student Life Programs – Career Development</b></p> <p><b>A. Gathering Data and Examining Current Operations</b></p> <ul style="list-style-type: none"> <li>• Examine CAS Standards SAG &amp; FALDO for Career Development</li> <li>• Write report comparing current operation to suggested standards</li> <li>• Identify areas of need for staffing and budget cuts or increases to meet suggested standards</li> </ul>	<p>Director of Career Development</p>	<p>10/31/2006</p> <p>12/31/2006</p>		<p>Done</p> <p>Reports, national standards, best practices</p>
<p><b>B. Developing USM Internship Program</b></p> <ul style="list-style-type: none"> <li>• List current internship data/data bases available to USM students</li> <li>• Identify potential areas of deficient listings</li> <li>• Work with faculty and staff and research ways to identify and/or create internships in areas listed as deficient</li> </ul>	<p>Director of Career Development</p>	<p>10/15/2006, then on-going</p> <p>10/15/2006</p> <p>On-going</p>		<p>In Process</p>

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<ul style="list-style-type: none"> <li>• Identify number of students participating in internships</li> <li>• Set a goal to grow program based upon current level</li> <li>• Write follow-up report of progress made</li> </ul>		5/31/2007		In Process
<p><b>C. Identify and Assist students with Graduate School Opportunities</b></p> <ul style="list-style-type: none"> <li>• Follow procedures and dates outlined in B above</li> </ul>		12/31/2007		In Process
<p><b>D. Identify and Assist students with employment opportunities</b></p> <ul style="list-style-type: none"> <li>• Follow procedures and dates outlined in B above</li> </ul>		5/31/2008		In Process

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**ACADEMIC PROGRAMS**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<p><b>Review academic programs to improve fiscal impact while maintaining academic quality</b></p> <p><b>A. Develop financial impact model</b></p>	VPAA, ALC, VPFAS	1/2007		<p>Done</p> <p>Program Analysis Template and Process Implemented 2006-07, Academic Leadership Council and Departments—end of year reports.</p> <p>ABC developed</p>
<p><b>B. Analyze each program in light of mission, strategic planning and fiscal impact, role of program in University's curriculum to improve fiscal stability and service to community</b></p>	VPAA, ALC	6/2007		<p>Program Analysis Completed 2007 Art, Biology, Chemistry Growth/Curricular Modification Plans approved and implemented ABC input</p> <p>Done</p>
<p><b>C. Develop plan for each program</b></p> <ul style="list-style-type: none"> <li>• Growth plan with goals &amp; deadline</li> <li>• Alternate or modify program</li> <li>• Move to support program</li> <li>• Eliminate program</li> </ul>	VPAA, ALC	10/2007		<p>Growth/Modification Plans for remaining programs/ABC input June 2008</p> <p>Done</p>

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**OPC OBJECTIVES**

<b>Action Steps</b>	<b>Person Responsible</b>	<b>Due Date</b>	<b>Metric</b>	<b>Progress Noted</b>
<b>A. Study and revise as needed the structural relationship between the OPC and main campus to improve the effectiveness and efficiency of both campuses.</b>	President			Done  Have comparative results  Measures, Student Surveys, Annual = Improvement
<b>B. Work with Pearson Achievement Solutions in introducing various professional development and certification programs to enhance MAT revenue and in building additional streams of revenue through class and program expansion.</b>	Online Director			Have a new partner: COMPASS
<b>C. Develop a growth strategy for OPC</b>		3/2007		In Process
<b>D. Eliminate as many obstacles to student admission and registration as possible</b> <ul style="list-style-type: none"> <li>• Review procedures for admissions and registration for Overland Park Campus</li> <li>• Propose changes in procedures for approval</li> </ul>	VP for Extended Sites	12/2006  1/2007	Report to Administrative Council  Report to Administrative Council	Done—monitoring processes.
<b>E. Enhance our understanding of the impact of OPC marketing</b>	Director of Marketing		Revised Reports	Done—Benchmarks in place, monitoring progress.

## FISCAL STABILITY

### Action Plan

<ul style="list-style-type: none"><li>• Refine reporting systems</li><li>• Determine metrics to measure results</li></ul>	VP for Extended Sites	3/2007	Establish metrics	In Process
<b>F. Monitor marketing campaigns</b> <ul style="list-style-type: none"><li>• Establish performance indicators</li><li>• Set Goals</li><li>• Monitor Results</li></ul>	Director of Marketing	3/2007	Quarterly Reports	In Process

