Transforming our Future:
Implementing Change in an Era of Innovation

President's Report
Fall Assembly
September 10, 2018

Presentation Outline

- Benchmarking Progress and Priorities
- Strategic Plan Overview – Bill Sommers (VP for Enrollment Management)
- Fall 2018 Student Enrollment – Bill Sommers
- FY2019 Budget – Pam Stevens (VP for Finance)
- Select New Initiatives
- WV Politics in Higher Education

Primary Goal: Attain financial stability to provide a world-class liberal arts education for the next generation of professional leaders and model citizens, and to serve as an educational resource for the community.

- Priority 1: To invest strategically in a regional recruiter to focus on recruitment efforts in Loudoun County and Fairfax County - - to impact enrollment.
- Priority 2: To expand the Office of Sponsored Programs (OSP) to support proposal writing and pre- and post-award services to PIs. (Director of OSP, Jessica Kump; Director of Strategic Research Initiatives, Dr. Jason Best)
- Priority 3: To increase extramural funding by at least 10% each year over the next five years to achieve a minimum of $3 million annually. (FY2018 and FY2019 to date $1,202,931)
- Priority 4: To advance public/private partnerships through Shepherd's Entrepreneurship and Research Corporation (SERC) - - to support ongoing and new initiatives.
- Priority 5: To create a user-friendly strategic plan to guide our efforts in transforming the future.

Shepherd University Strategic Plan
Transforming Our Future
Implementing Change in an Era of Innovation
2018-2023

The Shepherd Image

- *Goal 1:* Create a unified visual and communications identity that clearly relays to prospective students, collaborative partners, and the greater community, Shepherd University's distinctive brand of academic excellence and innovative spirit.

The Student Experience

- *Goal 2:* Empower and support Shepherd's increasingly diverse students as they pursue a rigorous and transformative education that includes academic experiences beyond the classroom, preparing them for ongoing and future academic and career growth.

The Employee Experience

- *Goal 3:* Encourage, recognize and reward faculty and staff for their contributions to the University's mission, within a collaborative working environment that fosters academic freedom and professional growth.

The Campus Environment

- *Goal 4:* Establish a financially and environmentally sustainable campus environment.

http://www.shepherd.edu/strategic-plan

Shepherd University Strategic Plan

Strategic Plan Implementation Phase

Implementation Teams

- Team formed and met during the summer
- Each team created a year-one implementation plan
- Strategic plan dashboards (External and Internal) under construction
- Updates shared with Steering Committee June, July, August

Transforming Our Future, Year-one 2018-2019

- Communications = Fall Assembly, Campus Communication, Board of Governors, Campus Committees
- Each team will work with departments/offices focusing on key strategies and tactics throughout the year

Goal 1: The Shepherd Image	Goal 2: The Student Experience
Team Leaders: Tim Haines and Valerie Owens	Team Leaders: Tom Segar and Scott Beard
Kristen Lorenz Kim Hutto Bill Sommers Ann Wendle Chauncey Winbush Jason Best Michael Groves Chiquita Howard-Bostic Janine Scott Kristen Kaineg	Jason Best Keira Cale Amy DeWitt Heidi Dobish Julia Flocco Michelle Ricketts Richard Stevens Yin Star Rachael Meads Lauren Mayer Traci Moyer Melanie Ford Timothy Maggio Virginia Hicks Anne Lewin Stacey Kendig
Goal 3: The Employee Experience	**Goal 4: The Campus Experience**
Team Leaders: Alan Perdue and Marie DeWalt	Team Leaders: Jack Shaw and Jim Sweeney
Cecelia Mason Johanna (Jenny) Lind Ben Martz Tammy Gill Jonathan Gilkerson	Will Bell Holly Frye Liz Sechler Jessica Kump Jeff Groff Monica Lingenfelter Dustin Robbins

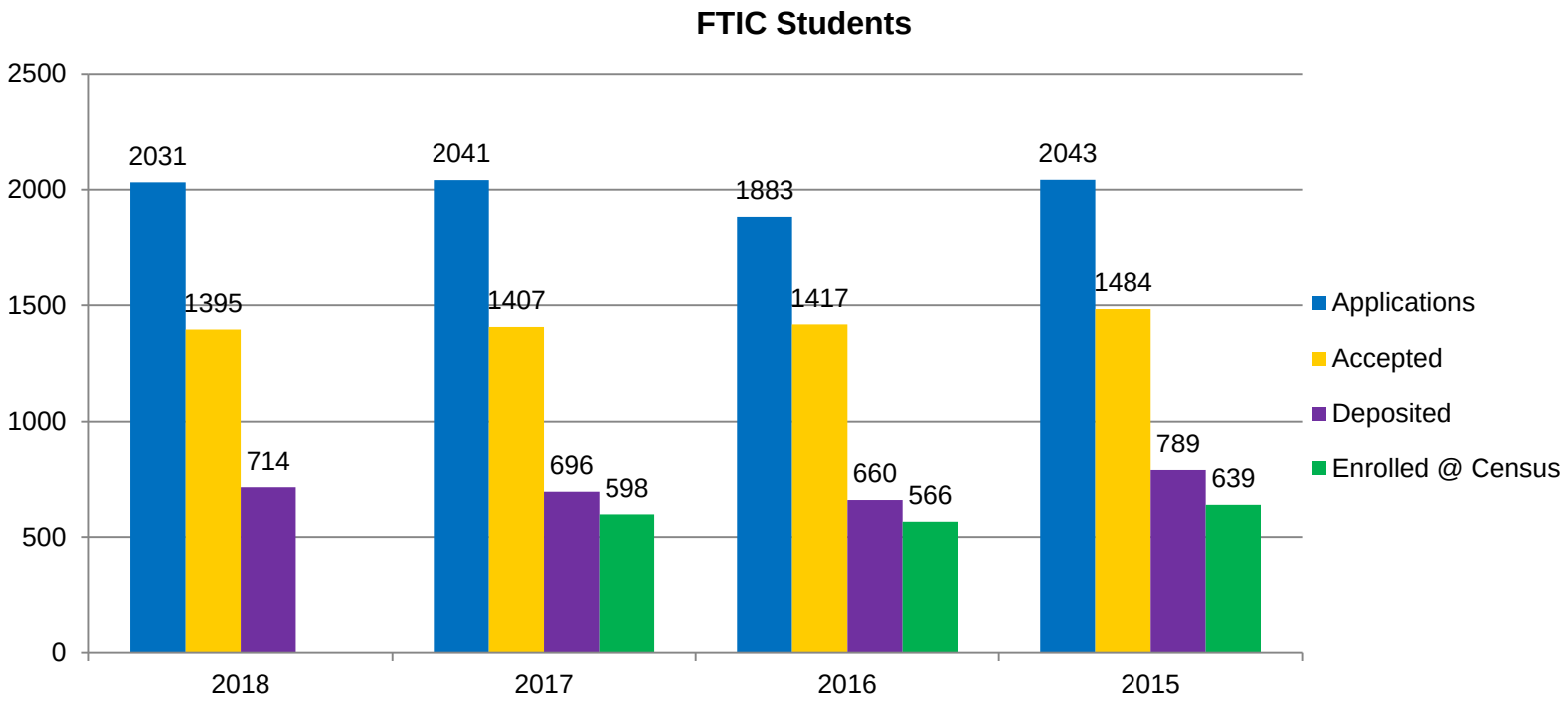
Enrollment Management

- Shepherd Pre-census Fall 2018 Enrollment
- Key Marketing and Recruiting Strategies

Enrollment Fall 2018

First-time in College (Freshman) Admission Build

	2018	2017
• Admission Conversion Rates		
• Application to Accept	69%	69%
• Accept to Deposit	51%	49%
• Deposit Cancellations (Melt)	8%	7%



Enrollment Fall 2018

University Enrollment Build

- Targets were established in conjunction with FY2019 budgeting process
- Predictive modeling was used to calculate targets

Headcount by Student Type	Fall 2018 Build	Fall 2018 Targets	% of Target
Continuing UG	1947	1905	102.2%
New Freshman	612	590	103.7%
Re-admit	41	40	102.5%
New Transfer	306	330	92.7%
Continuing Master's	103	100	103.0%
New Master's Student	45	80	56.3%
Total Degree Seeking Enrollment	3054	3045	100.3%
Non-degree UG	497	500	99.4%
Non-degree GR	36	100	36.0%
Total University Enrollment	3587	3645	98.4%

- **Build numbers as of 8/31/18 (end of drop/add week)**
- **Drop for non-payment-September 12, 2018**

Key Strategies and Results

Key Marketing and Recruiting Strategies

- Digital Marketing Campaign
  - A digital marketing campaign was conducted in Montgomery, Loudoun, and Fairfax Counties
    - Results: 2,000 click-throughs and 1.1 million impressions
  - Fifteen Facebook campaigns have been conducted
    - Results: 7,600 click-throughs, 338,000 viewers, and 1.2 million impressions

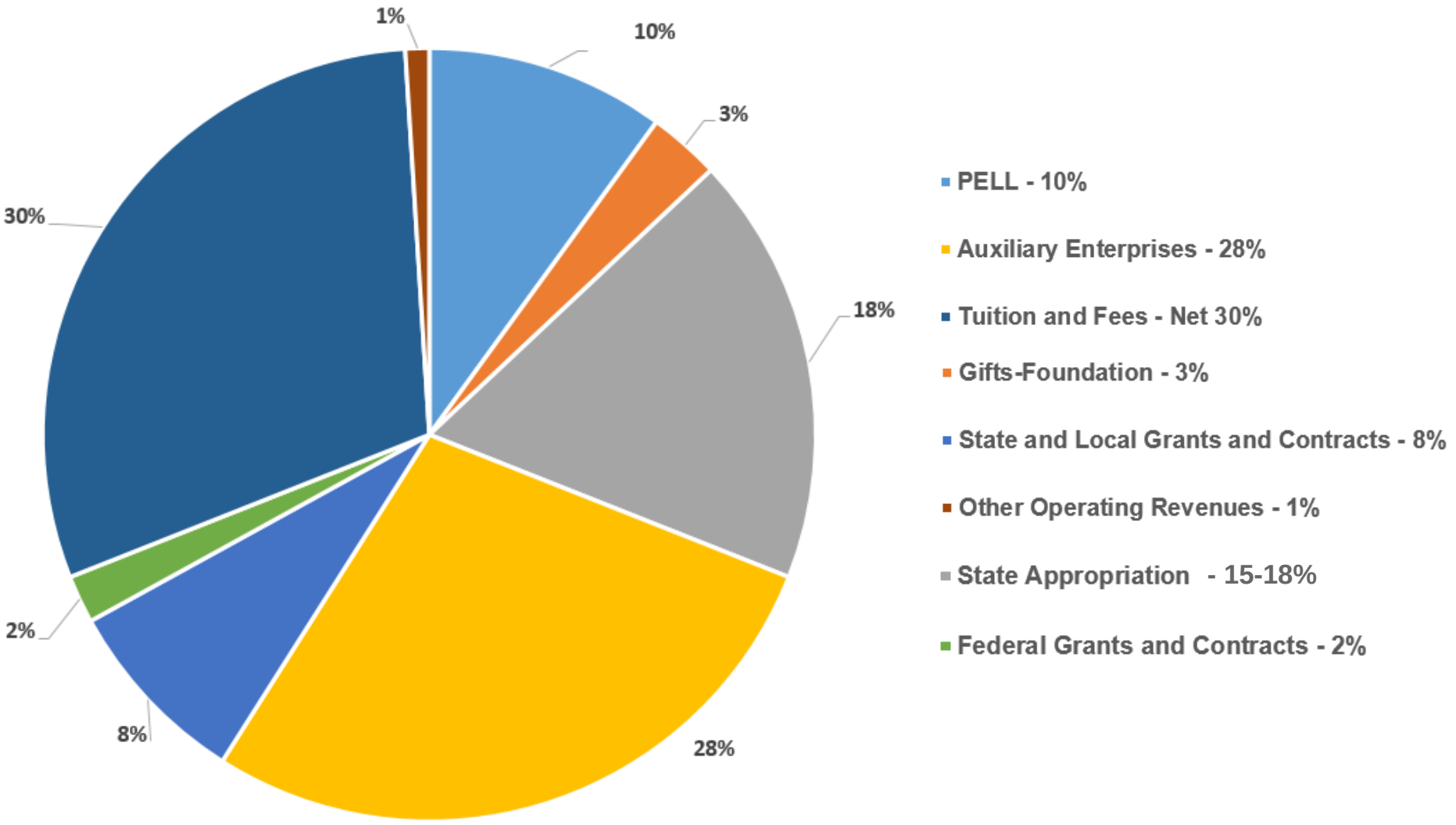
- Regional Recruiter-Northern Virginia
  - Applications, Accepts, and Enrollment deposits increased compared to last year.

- Financial Aid 2018-2019 Processing
  - FAFSA received ~4,500
  - Students Packaged ~2,000

- 2+2 Program Articulation Agreements
  - Dedicated webpage and print publication created for Transfer students and 2+2 agreements

- Fall 2017 High School Dual Enrollment to Full-Time Degree Seeking Students
  - 24 of 64 (37.5%) students have been accepted as degree-seeking students for Fall 2018

FY2019 Revenue Budget



FY2019 Action Plan – Collaborative Effort

- Recruit and Retain Students
- Develop Strategic Growth in Academic Programs
- Reduce Unnecessary Expenditures (All budgets were reduced to fund a pay raise for all FT/PT employees)
    - Opportunities – Campus Wide
        - Finance – Early Intervention for Student Account Collections
        - Bookstore Outsourced to Follett
        - Dining Services Outsourced to Chartwells
        - Energy Reduction Cost Savings ($400,000 vs. $374,536)
        - Reduction in Commercial Facilities Services ($220,000)
        - Cost Savings Associated with New Frontier Contract ($75,000)
- Revenue Growth – New Opportunities
    - Examples: Applied Business Lab and New Grant Programs

New Academic Programs

- Environmental Geomatics
- Computer Information Technology Concentration
- Contemporary Theater Studies
- Management Information Systems Concentration
- Master of Science in Data Analytics and Information Systems
- Sustainable Food Production Concentration
- Human Services, Agricultural Entrepreneurship and Sustainable Food Production RBA Concentrations
- Risk Management and Insurance Concentration
- Tourism, Hospitality and Entrepreneurship Concentration Anthropology and Geography Separate Minors
- Crime and Society Minor

Graduate Certificates

- Health Administration
- Public Management
- Sports Management

Undergraduate Certificates

- Agricultural Entrepreneurship
- Sustainable Food Production

What’s new on the horizon

Shepherd
UNIVERSITY
Veterans to Agriculture
Degree and Certificate Programs

OVERVIEW

Shepherd University is offering **bachelor's degrees and one-year certificate programs in sustainable food production and agricultural entrepreneurship** for veterans and civilian students who are inspired to grow organic produce in a small-scale sustainable farm setting. Students will learn food production, farm business management, accounting, and marketing and work with a local farm manager on Shepherd's Tabler Farm.

LEARN MORE: www.shepherd.edu/vetstoag

- Hands-on practice with local farm manager.
- Learn farming tools and business tips from field experts.
- Prior farming experience not required.
- Veteran support services available on campus.
- Gain technical skills necessary to embark on new careers including: nursery and greenhouse managers, soil and water conservationists, farm and ranch managers, and more!

ABOUT SHEPHERD

Shepherd University is a public liberal arts university situated on the border of West Virginia and Maryland. Access to the academic, cultural, and career experiences in the nation's capital region, challenging academic courses, excellent faculty, and small class sizes provide more personalized education for the serious student. Internships and post-degree employment opportunities provide valuable practical experience. Shepherd University is in a safe, historically and culturally-rich region also noted for four-season sports and recreation.

90 Minutes
from Downtown Washington, D.C.

Mentorship
Students Actively Participate with Professors on National and International Projects

$8 Million
Research and Program Grants

Shepherd UNIVERSITY

Veterans to Agriculture Program
Dr. Peter Vila, Program Director
pvila@shepherd.edu | www.shepherd.edu/vetstoag | P.O. Box 5000, Shepherdstown, WV 25443

Aero-Smith

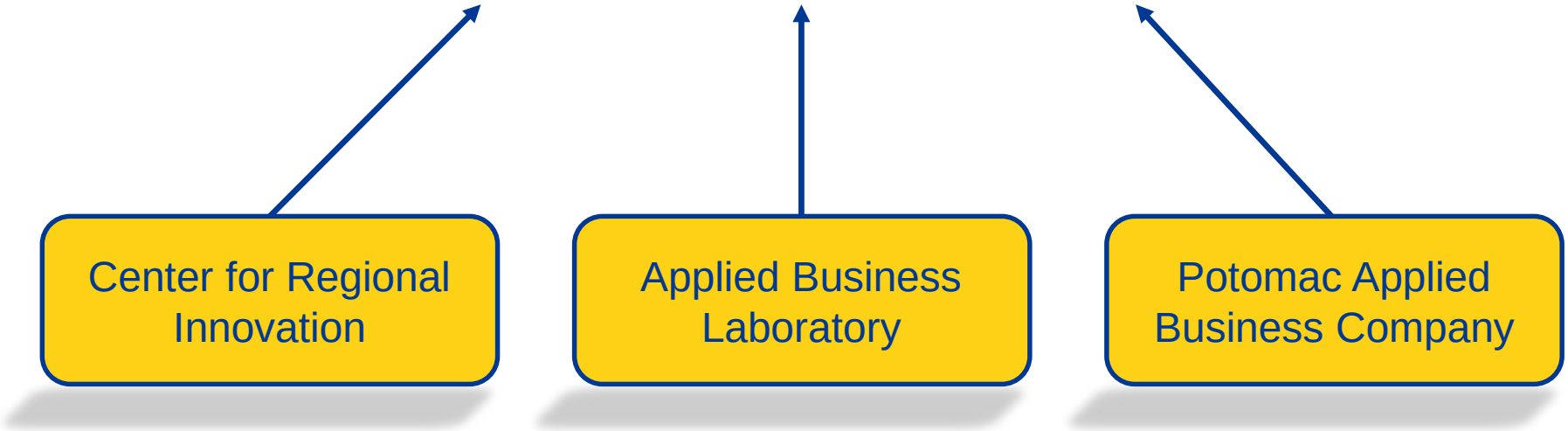
Aviation Interns Job Opportunity – Martinsburg Regional Airport

We are seeking an energetic, responsible intern to join our growing organization. In this position, you will be expected to learn the ins-and-outs of our daily routines and procedures.

Intern Duties and Responsibilities

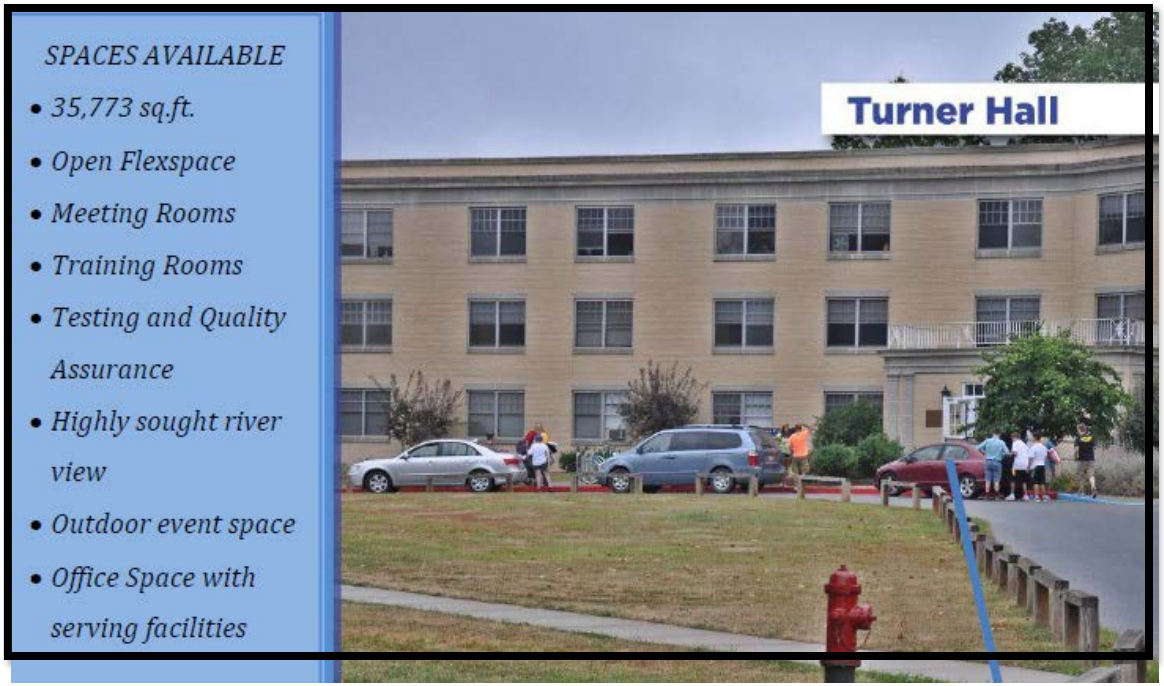
- Answer and log phone inquiries, direct calls, and provide basic company information
- Perform clerical and administrative duties
- Assist in preparing information and research materials
- Sort and manage files (paper & electronic)
- Oversee mail deliveries, packages from couriers
- Take and record notes of meetings
- Run general company related errands
- Respond to web correspondence, social media posts, and emails
- Research and gather documentation on various Aviation activities
- Set up, break down, organize, and maintain meeting rooms
- Create and maintain PowerPoint presentations
- Update and post supervised social media and website content

Shepherd Entrepreneurship Research Corporation (SERC)



- Offering Specialized Workshops
- Provision of Drone Services
- Center for Civil Military Innovation Institute
- Institute for Higher Reliability
- Repurposing Turner and Kenamond Residential Halls

Turner and Kenamond Re-Purpose Opportunities



Possible Space Uses

There are multiple potential uses to design the remodel of Turner and Kenamond. Possible room use considerations include:

- Quality Improvement Teams
- Software Testing Labs
- Hardware Testing Labs
- Event Space
- Conference Facilities
- Office Space
- Student Groups
- Workforce Training Classrooms
- Academic Classrooms
- Independent Living Facility

Dinner with Strangers Initiative

Community involvement with Capstone Projects?

WV Politics in Higher Education

- The West Virginia State Legislature passed legislation that the West Virginia Higher Education Policy Commission (HEPC) shall examine general revenue appropriations to state higher education institutions on or before January 1, 2018.
- The HEPC unveiled a funding model titled “Student-Focused Funding for West Virginia Higher Education” on March 23, 2018.
- **SHEPHERD** would see an **INCREASE OF $3.4 MILLION** in funding under the new model.
- **SHEPHERD** has been the **LOWEST FUNDED STATE INSTITUTION** for decades due to an unfair funding model.

- The new funding model would correct this **longtime funding penalty against Shepherd**.
- The new funding model **emphasizes using state tax dollars to fund the education of state residents**.
- Penalized in the new model were two schools with large numbers of out-of-state students: WVU and WVU Tech.
- During a public comment period, the HEPC chancellor received **96 percent approval of the new funding model** based on 1,300+ comments.
- WVU's president is among those who complained about the funding model.

- On June 28, the governor announces a Blue Ribbon Commission to examine four-year public higher education to be completed by December 10, 2018.
- WVU's president is one on the three co-chairs, along with the presidents of Marshall and Concord universities.
- Composition of the Blue Ribbon Commission is stacked with **WVU partisans who make up 36 percent** of the commission membership.
- **Shepherd is represented** on the commission by **Board of Governors chair and alumnus Eric Lewis**.

- At its July 10 meeting, the HEPC votes to place the current chancellor (Dr. Paul Hill) on sabbatical and names WVU Tech's president (Ms. Carolyn Long) as the interim chancellor and suspends the search for a new chancellor until after the Blue Ribbon Commission finishes its work in December.
- In summary, this move places the **LEADERS OF THE TWO BIGGEST LOSERS IN THE NEW FUNDING FORMULA** in charge of state higher education:
  - WVU's president is co-leading the Blue Ribbon Commission which will recommend the fate of state schools, including Shepherd.
  - WVU Tech's president is now the interim chancellor leading state higher education.
  - Shepherd's president declares "a hostile takeover of higher education in WV" that is picked up by the national press with continuing investigations.

Princeton Review Ranks WVU Nation's No. 2 Party School

Photo Courtesy of Trib Total Media

Public, Flagship University Comparison

Student Retention and Graduation

University	First-time, Full-time Fall-to-Fall Retention %	Six-year Graduate Rate %
Clemson University	93	81
Auburn University	90	71
University of Alabama	86	65
University of South Carolina	86	65
Louisiana State University	85	67
University of Tennessee	85	68
University of Kentucky	83	60
University of Arkansas	82	61
Mississippi State University	82	61
University of New Mexico	80	50
University of Oklahoma	80	50
West Virginia University	79	58

SOURCE: INTEGRATED POSTSECONDARY EDUCATION DATA SYSTEM (IPEDS)

ROI for Investment in State Schools

SOURCE IMPACT: HTTP://WWW.WVHEPC.EDU/WEST-VIRGINIAS-PUBLIC-HIGHER-EDUCATION-INSTITUTIONS-HAVE-2-7-BILLION-IMPACT-ON-STATE/

- WVU-Main Campus: $1.4 billion
- Marshall University: $397.7 million
- Shepherd University: $91.1 million
- Fairmont State University: $82.6 million

School	Impact	Investment (State Funds)	ROI (Impact / Investment)
WVU	1,400,000,000	102,931,727	13.60
Shepherd	91,100,000	9,360,954	9.73
Marshall	398,000,000	44,499,000	8.94
Fairmont	82,600,000	14,579,417	5.66

ADVOCACY FOR SHEPHERD

Home ▸ Advocacy

Advocacy

Shepherd University has created this advocacy page to help our alumni, faculty, staff, students, and community members keep up-to-date with the issues that could impact Shepherd and higher education in the state of West Virginia.

- A second version of the funding formula was unveiled on August 24, 2018, which reduces Shepherd's proposed allocation of $3.4 million additional annual appropriation to $2.3 million.
- There is an additional proposal under consideration that would give Shepherd $2,840,000 for FY2019, based on funds from the State's $28 million surplus in FY2018. The legislature would have to approve this.

http://www.shepherd.edu/advocacy/