**Middle States Commission on Higher Education**
**Periodic Review Report**


**Presented by:**

**West Chester University of Pennsylvania**
**West Chester, Pennsylvania**


**Date:**

**June 2006**


**Chief Executive Officer:**

**Dr. Madeleine Wing Adler, President**


**Commission action which preceded this report:**

**Reaccreditation, 2001**


**Date of the Evaluation Team's visit:**

**March 11-14, 2001**

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# PRR Committees

## Executive Committee

Dr. Linda L. Lamwers, Provost and Vice President for Academic Affairs, Co-chair PRR
Executive Committee and Chair Assessment Committee
Dr. Lynn K. Spradlin, Associate Professor of Counseling and Educational Psychology, Co-chair
PRR Executive Committee and Co-chair Human Capital Transformation Committee

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Dr. Suzanne Austin, ACE Fellow
Dr. R. Lorraine Bernotsky, Associate Professor of Political Science, SPRC Cabinet Liaison
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Dr. Giovanni Casotti, Associate Professor of Biology, Co-chair Diversity Transformation
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Mr. Thomas Clark, Director of Facilities Planning, Co-chair Responsiveness Transformation
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Ms. Barbara Cooper, AFSCME and Custodial Services, Co-chair Diversity Transformation
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Dr. Mary Lou D'Allegro, Director of Institutional Research, Co-chair Enrollment Management
and Finance Committee
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Ms. Jaqueline Hodes, Assistant to the Vice President for Student Affairs
Dr. Deborah Mahlstedt, Professor of Psychology, Chair of Pedagogy for Engagement Committee
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Mr. Adel Barimani, Executive Director of Academic Computing Services
Mr. Casey A. Beggs, Student
Mr. William E. Bennett, Executive Director of Facilities
Ms. Amy W. Boland, Director of Fiscal Affairs

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Mr. Mark P. Mixner, Vice President for Administrative and Fiscal Affairs, Co-chair

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Ms. Lisa Yannick, Institutional Research Analyst

# Acronyms

3E Institute: Institute for Educational Excellence and Entrepreneurship
AACSB: Association to Advance Collegiate Schools of Business
AAUP: American Association of University Professors
ABC: Administrative Budget Committee
ABET: Accreditation Board for Engineering and Technology
ACE: American Council on Education
ACEER: Amazon Center for Environmental Education and Research Foundation
ADP: Academic Development Program
AFSCME: American Federation of State, County, and Municipal Employees
APSCUF: Association of Pennsylvania State College and University Faculty
AYM: Academic Year Model
CAPC: Curriculum and Academic Policies Council
CADE: Commission on Accreditation for Dietetics Education-American Dietetics
CBA: Collective Bargaining Agreement
CEPH: Council on Education for Public Health
CIRP: Cooperative Institutional Research Program
CF: Conceptual Framework (for teacher education)
CME: Continuing Medical Education
COE: College of Education
CSRDE: Consortium for Student Retention Data Exchange
CSWE: Council on Social Work Education
EMC: Enrollment Management Steering Committee
FAQs: Frequently Asked Questions
FOCUS: A Career and Educational Planning System, a trademark of Career Dimensions, Inc.
GASB: Governmental Accounting Standards Board
GEAR UP: Gaining Early Awareness and Readiness for Undergraduate Programs
ILLiad: Interlibrary Loan Internet Accessible Database (OCLC's resource sharing management software)
KLN: Keystone Library Network
LAN: Local Area Network
LARC: Learning Assistance and Resource Center
LINCS: Leadership, Involvement, Networking, and Career Skills
NASM: National Association of Schools of Music
NAST: National Association of Schools of Theatre
NCATE: National Council for Accreditation of Teacher Education
NLNAC: National League for Nursing Accrediting Commission
OCLC: Online Computer Library Center
OIR: Office of Institutional Research
OMA: Office of Multicultural Affairs
P-16: Preschool through grade 16, culminating in a baccalaureate degree
PALCI: Pennsylvania Academic Library Consortium, Inc.

PALINET: Formerly Pennsylvania Library Network, PALINET is the name of a member-owned and governed regional library network serving more than 600 members throughout the mid-Atlantic region and beyond.

PASSHE: Pennsylvania State System of Higher Education

PDE: Pennsylvania Department of Education

PEC: Pedagogy for Engagement Committee

PRC: CAPC's Program Review Committee

PPD: Pharmaceutical Product Development

PRR: Periodic Review Report

Praxis: The Praxis Series: Professional Assessment for Beginning Teachers, a trademark of the Educational Testing Service

QUIC: Quality Instructional and Course Report Rating Form

R2 process: Review and Revalidate process

R25: Resource 25 class and event scheduling software, a trademark of CollegeNET

RECAP: Resources for the Electronic Classroom: A Faculty-Student Partnership

SAP: SAP America, Inc.

SaLe: Sabbatical and Educational Leave Committee

SLOC: Student Learning Outcomes Committee

SOMPAC: The Swope Music Building and the Performing Arts Center

SPRC: Strategic Planning Resource Council

SSM: Summer School Model

SWOT: Strengths, Weaknesses, Opportunities, Threats

TEC MBA: Technology and Electronic Commerce Master of Business Administration

TeP: Tenure and Promotion Committee

The *Plan*: *A Plan for Excellence*

UBC: University Budget Committee

UDL: Universal Design for Learning

USH: University Student Housing, LLC

WCU: West Chester University of Pennsylvania

WHYY: Public television and radio station for Greater Philadelphia

Y2K: The year 2000

# Chapter 1
# Executive Summary

**OVERVIEW OF WEST CHESTER UNIVERSITY**

**History**

Throughout its history, West Chester University (WCU) has served residents of the greater Philadelphia region and has been a cultural center for Chester County. West Chester University had its origin in West Chester Academy, a private, state-aided preparatory and teacher-training school founded in 1812. The academy became West Chester Normal School in 1871, West Chester State Teachers College in 1927, West Chester State College in 1960, and West Chester University in 1983, when it also became one of 14 universities in the Pennsylvania State System of Higher Education (PASSHE). Since the 1960s, West Chester University has offered a broad range of liberal arts and professional degree programs as a Master's I comprehensive institution. The 2006 U.S. News & World Report rankings include WCU among the top master's universities in the northern region, spanning New England down through Maryland and the District of Columbia. Similarly, the current Princeton Review rankings list West Chester University among the "Best in the Northeast." WCU is the second largest campus in the State System and the fourth largest institution of higher education in the Philadelphia region. Within the State System, WCU is known for its academic excellence across all of its five colleges, the diversity of its student body, its innovative business processes that promote efficiency, and its leadership development programs.

*A Plan for Excellence*

In 2001, West Chester University submitted a "special topics" self-study based on the University's strategic planning process, which was concurrent with the self-study. The subsequent plan, *A Plan for Excellence*, has defined University priorities by focusing on five transformations, with goals established for each transformation. The *Plan*'s priorities were defined as "transformations" because there was a deliberate focus on institutional change and high aspirations. The *Plan for Excellence* developed a WCU Vision Statement for the first time, and this vision for the future led to a succinct new Mission Statement. In addition, the University decided to retain its Values Statement that had been developed as part of the previous five-year strategic plan (*WCU 2000*). At that time, WCU had been one of the few public universities to adopt a values statement, and this fact had been widely accepted as a point of pride over the previous several years. *A Plan for Excellence* has served the University well for the last five years and continues to do so, and the Periodic Review Report (PRR) provides the opportunity for assessment of the *Plan* and its goals.

**The West Chester University Vision Statement**

West Chester University will be a national model for excellence for public regional comprehensive universities and especially noted for

- Undergraduate programs that actively engage students in connecting the life of the mind to the world in which they live and work

- The responsiveness of its graduate and post-baccalaureate programs to regional needs

- Its focus on providing lifelong-learning, technical, and applied skills essential to graduates' success now and in the future

- A commitment by faculty, staff, and administrators to provide access and to serve effectively the educational needs of a diverse student body

- Its role as a leading educational and cultural resource and partner in fostering the economic, social, and cultural vitality of southeastern Pennsylvania

**The West Chester University Mission Statement**

West Chester University, a member of the Pennsylvania State System of Higher Education, is a public regional comprehensive institution committed to providing access and offering high-quality undergraduate education, select post-baccalaureate and graduate programs, and a variety of educational and cultural resources for its students and alumni and the citizens of southeastern Pennsylvania.

**The West Chester University Values Statement**

West Chester University is committed to attracting, enrolling, and graduating quality students from a wide variety of educational, cultural, and economic backgrounds. This endeavor requires the University to attract and retain highly qualified faculty and staff and to provide each member of the University community with learning and leadership development opportunities. To this end, the University supports and encourages programs that benefit all people and that seek to eradicate discrimination and injustice. We treasure what we believe to be the highest principles of American society: the worth and uniqueness of each individual, the belief that success is to be earned by individual effort put forth in an environment founded on equality of opportunity, and the appreciation of the ideal of an inclusive society.

We believe that it is incumbent upon all members of our community—staff, students, faculty, and administrators—to conduct themselves with civility toward one another at all times. We value the special talents and contributions of each member of our community. We further affirm the worth and dignity of each member and the shared responsibility of all to treat each other as individuals, with respect and courtesy.

As a university owned by the citizens of Pennsylvania, we value our mission to provide the best educational opportunities possible that will enable the University community to address successfully the concerns of a global society. To this end, West Chester University seeks to provide diligent advising for students and to focus on teaching students to think clearly and critically, to make logical and ethical judgments, and to communicate effectively with others.

West Chester University's community strongly supports the principles of academic integrity and academic responsibility, viewing both as the province of every member of the campus community. We hold the highest esteem for teaching directed toward student learning and affirm that mastery of content, as well as mastery of teaching skills necessary to communicate such content, is paramount.

This values statement is intended to be a living document that will serve West Chester University as it changes and evolves in the coming years.

**The *Plan for Excellence* Transformations**

The *Plan for Excellence's* five transformations are summarized below. Readers are referred to the full text of the *Plan* for details.

1. Responsiveness Transformation: WCU will increase its responsiveness to the educational and cultural needs of its region.

2. Student Success Transformation: WCU will make student success its defining characteristic.

3. Diversity Transformation: WCU will strengthen its commitment to pluralism, access, equity, and a supportive campus climate for a diverse community of students, staff, faculty, and administrators.

4. Human Capital Transformation: WCU will increase its investment in the continued development of the skills and knowledge of its faculty, staff, and administrators.

5. Resourcefulness Transformation: WCU will diversify the base of its physical and fiscal resources and increase the effectiveness with which they are managed.

**West Chester University Organization and Governance**

The president is the chief executive officer of the University. The University is organized into five major divisions—Academic Affairs, Administrative and Fiscal Affairs, Advancement, Information Services, and Student Affairs—each headed by a vice president who reports directly to the president. The offices of Governmental Relations and Social Equity also report directly to the president. The vice president for academic affairs/provost is responsible for the general administration, organization, and development of all academic programs and related instructional services of the University. The Division of Academic Affairs consists of the College of Arts and Sciences, the College of Business and Public Affairs, the College of Education, the College of Health Sciences, and the College of Visual and Performing Arts, as well as Library Services, Undergraduate Studies and Student Support Services, Graduate Studies and Extended Education, Admissions, Financial Aid, Registrar, and Sponsored Research and Faculty Development. A University organizational chart can be found in the appendices.

West Chester University is part of the 14-campus, Commonwealth-owned Pennsylvania State System of Higher Education, established in 1983 by the Pennsylvania legislature "to provide high quality education at the lowest possible cost to students." The four levels of governance for the System are the Board of Governors, the Office of the Chancellor, 14 institutional councils of trustees, and 14 institutional presidents. The Board of Governors, whose members are appointed by the governor for four-year terms (with no limit on the number of terms) sets State System policy and provides final approval of all presidential appointments based on the chancellor's recommendation.

The University is governed by a Council of Trustees, whose members are appointed by the governor for six-year terms (except for the undergraduate student trustee, whose term expires upon graduation). At least two trustees must be alumni of the University. The trustees are charged with evaluating the president, monitoring the fiscal health of the institution, and approving all student fees. The Council of Trustees has six standing committees: Finance and Budget, Academic Affairs, Advancement, Campus Development and Facilities, Technology, and Student Affairs.

Three bodies involved in the governance of the University are the Faculty Senate, the Association of Pennsylvania State College and University Faculty (APSCUF), and the University Forum. The members of the Senate are elected by the faculty and make policy recommendations to the president on all matters of faculty concern. Members of the APSCUF Delegate Assembly are elected by the faculty and deal with all issues related to the Collective Bargaining Agreement (CBA). The University Forum is a campus-wide committee of faculty, staff, and students that supports the University's commitment to civility, identifies campus needs, and makes recommendations to the president. With management, APSCUF also determines the by-laws of four University committees that are included in the CBA: the University Budget Committee (UBC), the Curriculum and Academic Policies Council (CAPC), the Tenure and Promotion Committee (TeP), and the Sabbatical and Educational Leave Committee (SaLe). The UBC advises the president on the formulation of the University budget and on the development and implementation of University fiscal policies, both short-term and long-range. CAPC addresses two curricular purposes: developing, revising, and recommending academic creation of new or elimination of existing academic programs sent by faculty; and developing, revising, and recommending academic policies. TeP is responsible for reviewing tenure and promotions applications and recommending the tenure and promotion of tenure-track faculty members. SaLe is responsible for reviewing sabbatical applications and recommending faculty for sabbaticals. A list of the University's major committees can be found in the appendices. The APSCUF CBA can be viewed on the Web site http://www.passhe.edu/content/?/administration/HR/labor/unions/apscuf.

**Faculty and Staff**

West Chester University employs 567 full-time faculty, of whom 48% are female and 15% are minority. WCU has the largest percentage of full-time minority faculty in the State System (except for the one system university that is historically black). Most full-time faculty hold terminal degrees (85%). All classes are taught by ranked faculty, and none are taught by graduate students. WCU employs 687 full-time staff members, of whom 55% are female and 24% are minority. The full-time staff includes 45 executives/administrators, 200 other professionals, and 442 staff in the following categories: technical/paraprofessional, clerical/secretarial, skilled crafts, and service/maintenance. (Data are from fall 2005.) The faculty, athletic coaches, certain technical and professional employees, and all other staff except for managers and executives are unionized. Collective bargaining for all unions takes place at the state level, with no local control over collective bargaining agreements.

**Students and Enrollment**

West Chester University's current enrollment (fall 2005) is 12,988 students (10,838 undergraduate and 2,150 graduate students), which represents a planned increase from 12,224 students five years ago. The decision to grow was a function of declining allocations from the state and favorable demographics in the Philadelphia region. Both undergraduate and graduate admissions operations increased recruitment efforts. At the undergraduate level, 90% of students are full-time and 10% are part-time; 61% are female and 39% are male; 86% are white and 14% are minority. Most undergraduate students are traditional age (17-24). The residence halls accommodate 38% of the undergraduate student body; of the remaining 62%, about half live in apartments in West Chester, and about half commute from home. At the graduate level, 75% are

female and 25% are male; 90% are white and 10% are minority; 73% are part-time and 27% are full-time. Most graduate students are part-time, working, commuting adults.

West Chester University's five colleges offer 112 bachelor's degree programs, 6 undergraduate certificate programs, 68 undergraduate minors, 73 master's degree programs, 33 post-baccalaureate certificate programs, and 1 post-master's certificate program.

Undergraduate programs with the largest enrollments in fall 2005:

| | |
|---|---|
| Art—228 | Health and Physical Education—656 |
| Accounting—273 | History—404 |
| Biology—272 | Management—427 |
| Chemistry—255 | Marketing—299 |
| Communication Studies—382 | Music Education—309 |
| Criminal Justice—330 | Nursing—291 |
| Early Childhood—306 | Professional Studies—222 |
| Elementary Education—873 | Psychology—470 |
| English—411 | Political Science—241 |
| Health—291 | Special Education—255 |

Graduate programs with the largest enrollments in fall 2005:

| | |
|---|---|
| Communicative Disorders—99 | Health—100 |
| Counseling—243 | Literacy—159 |
| Elementary Education—225 | Psychology—81 |
| English—108 | |

Total enrollments by college in fall 2005:

College of Arts and Sciences—3,707
College of Business and Public Affairs—2,172
College of Education—2,210
College of Health Sciences—1,736
College of Visual and Performing Arts—789
Non-degree, undeclared—2,374

The following information summarizes undergraduate admissions for fall 2005:

- WCU received 11,013 applications, a 40% increase from fall 2001.
- 2,863 were admitted, including 961 transfers.
- The first-year class is 15% minority.
- The top 10 feeder high schools are within a 50-mile radius of WCU.
- 84% of WCU students reside in Pennsylvania.
- 54% of transfers are from Pennsylvania community colleges.
- 10% of transfers are from other PASSHE institutions.

- The average SAT score for entering first-year students is 1,067, classifying WCU as a selective institution. (The SAT range for selective institutions is 1,045-1,100, as designated by the Consortium for Student Retention Data Exchange [CSRDE]). Pennsylvania's combined mean score is 1,004, and the national combined mean score is 1,028.

- The following majors enrolled 50 or more first-year students: Biology, Chemistry, Communication Studies, English, History, Psychology, Early Childhood, Elementary Education, Criminal Justice, Health and Physical Education, and Music Education.

- According to the 2004 Cooperative Institutional Research Program (CIRP) Survey, WCU is the first choice for two-thirds of incoming students.

The following information summarizes graduate enrollment for fall 2005:

- WCU received 1,226 applications, a 5% increase over fall 2004.

- 1,041 were admitted, a 5% increase over 2004.

- 2,150 students enrolled, a 1% decrease from 2004 but with a 6% increase in credit hour production.

- The entering students were 11% minority.

- 73% enrolled as part-time students and 27% as full-time, representing a 9% increase in full-time students from fall 2004.


**PREPARATION OF THE PERIODIC REVIEW REPORT (PRR)**

In 2001, West Chester University conducted a "special topics" self-study based on its strategic planning process. *A Plan for Excellence* focused University goals through five transformations. The Strategic Planning Resource Council (SPRC) was established as a strategic plan monitoring committee, submitting annual reports to the President's Cabinet. Thus, the process and structure of this Periodic Review Report were also based on the *Plan for Excellence*, and SPRC has played a key role in information gathering and analysis. The preparation of the PRR took place over two years because of the size and complexity of WCU and the desire for an inclusive process. As in the preparation of the self-study, a broad group of faculty, staff, and student leaders were involved, and the entire campus was invited to respond to the draft. The PRR has become an integral part of WCU's strategic planning process, giving the University community the opportunity to revisit the *Plan* and assess progress to date.

Planning the PRR process began in 2004, led by the provost, the Middle States liaison, and the director of Institutional Research, subject to approval by the President's Cabinet. In fall 2004, the president appointed committee members, committees were charged and provided with necessary materials, and members of the executive committee met with all major faculty, student, and staff groups on campus to inform them of the nature of the PRR and the process. Seven committees were created to gather information for the PRR. Five of these committees were based on the five transformations of the *Plan for Excellence*: Responsiveness, Student Success, Diversity, Human Capital, and Resourcefulness. Each of these five committees was co-chaired by two members of SPRC. One dean, one member of the President's Cabinet, and one

student were assigned to each of the transformation committees. The student member of SPRC also served on the Student Success Committee. All of the other committee members were faculty and staff with relevant expertise. There was also a committee on assessment chaired by the provost and a committee on enrollment management and finances co-chaired by the vice president for administrative and fiscal affairs and the director of Institutional Research. The executive committee for the PRR process, co-chaired by the provost and a SPRC faculty member, provided oversight. The PRR committee list is included with this report.

Committees carried out their assignments with a deadline of September 1, 2005, for submission of their reports. In the fall of 2005, the PRR was drafted and then shared with the entire campus in early 2006 and posted on the University Web site. SPRC played a central role in disseminating the PRR to the campus community. Members presented key features of the PRR draft to a wide range of campus committees—including the President's Cabinet, Deans Council, APSCUF, the Faculty Senate, the Student Government Association, the Managers Association, the Curriculum and Academic Policies Council (CAPC), Student Affairs, and the Chairs Council. Hard copies of the PRR draft were disseminated to these groups, and to other members of the campus community upon request. SPRC also administered a survey asking for feedback on the PRR and, more specifically, on the *Plan for Excellence*. Feedback led to revisions of the PRR and the sharing of the final draft with the President's Cabinet in the late spring of 2006.


## SUMMARY OF MAJOR INSTITUTIONAL CHANGES SINCE THE 2001 SELF-STUDY

### College of Visual and Performing Arts (Standard 1)

At the time of the decennial accreditation, there were five school/college units in the Division of Academic Affairs: the College of Arts and Sciences, the School of Business and Public Affairs, the School of Education, the School of Health Sciences, and the School of Music. In July 2004, a new College of Visual and Performing Arts was established by combining the School of Music with the departments of Art and Theatre Arts, which had formerly been housed in the College of Arts and Sciences, and with the dance program formerly housed in the School of Health Sciences. The president initiated this structural change as part of the planning for a new building currently under construction and renovation of an adjacent building—both of which will house the arts. Contiguous space for the arts programs on campus and consolidation into a new college will promote more collaboration and cooperation among the arts in academic programs, extracurricular events, fundraising for the arts, and service to the community.

Subsequently, the schools were renamed *colleges* to provide consistent nomenclature for all units. Currently, the five colleges are the College of Arts and Sciences, the College of Business and Public Affairs, the College of Education, the College of Health Sciences, and the College of Visual and Performing Arts.

The College of Visual and Performing Arts contributes to two *Plan for Excellence* goals: Responsiveness goal R.4., "Expand the University's role as a center for the cultural arts in Chester County," and Student Success goal S.1., "Enhance curricula and instructional modes that actively engage learners in connecting theoretical and applied knowledge and improve the

quality of their learning." The new college contributes to meeting *Characteristics of Excellence* Standard 1: Mission, Goals, and Objectives by focusing WCU's arts programs.

**Graduate Business Center (Standards 1, 3, 13)**

In 2002, WCU opened a new Graduate Business Center at an office park three miles north of the main campus and visible from U.S. Route 202, the main highway in the area. The dean of the College of Business and Public Affairs oversaw the design and supervises the site, which houses graduate business programs (MBA and MSA degrees), the Business Technology Center, the Center for Social and Economic Research, the Internet Presentations Group, the Center for Information Assurance, and the Department of Counseling and Educational Psychology—all of which serve either adult evening students or the business community. The center also provides space for many training courses, workshops, seminars, and retreats that serve the University, business, and community groups. The center has increased accessibility for evening students and also provides state-of-the-art classrooms and technology for instruction. When programs were moved to the center, there was no change in governance or administrative organization.

The Middle States Commission on Higher Education determined that the Graduate Business Center was a substantive change, and the Committee on Substantive Change accepted the University's substantive change report on April 21, 2003. This documentation may be found in the appendices. The Graduate Business Center contributes to two *Plan for Excellence* Transformations: Responsiveness and Resourcefulness. The Center also contributes to meeting three *Characteristics of Excellence* standards, Standard 1: Mission, Goals, and Objectives (serving students and the community), Standard 3: Institutional Resources (effective resource acquisition and efficient utilization), and Standard 13: Related Educational Activities (additional location).

**PASSHE Policy on Funding Capital Facilities (Standard 3)**

In 2000, the PASSHE Board of Governors approved Policy 2000-02: Capital Facilities Planning, Programming, and Funding, which revised funding for capital projects, thus impacting new construction on campus since the last self-study. Although PASSHE retains approval for all capital projects, PASSHE will no longer fully fund the costs. The state will now fund 50% of capital funding for educational facilities; the remaining 50% must be funded by the institution or from private sources through fundraising. Capital funding for most auxiliary projects must be pursued through private/public alliances and financed by a user-fee self-liquidating process through appropriate not-for-profit entities.

This policy affects three new educational facilities that are part of the University's current capital campaign: the Swope Music Building and the Performing Arts Center (SOMPAC, under construction), the Undergraduate Business Center, and the Mathematics and Information Technology Center. The policy also enabled private funding for two new parking garages and new student housing (788 beds). Policy 2000-02 may be found in the appendices. This Board of Governors policy supports the *Plan for Excellence* Resourcefulness Transformation, the Comprehensive Facilities Plan (incorporated into the *Plan for Excellence*), and *Characteristics of Excellence* Standard 3: Institutional Resources.

**The Fund for West Chester University of Pennsylvania and PASSHE Foundation Guidelines (Standard 3)**

The Fund for West Chester University was established in 2000 as a nonprofit corporation within the meaning of section 501 (c) (3) of the Internal Revenue Code. The corporation is organized exclusively for charitable, scientific, and educational purposes to promote the interests of West Chester University. The corporation was created to solicit all gifts (cash or other) to the University and to manage all gifts and contracts. The Fund's purpose is to undertake tasks on behalf of the University that WCU is unable to perform because of various restrictions that are common to public institutions. In essence, the Fund serves as the University's entrepreneurial arm enabling advanced fundraising, more flexible endowment management, privatized projects such as student and staff housing, intellectual property management, and similar functions that are generally more successful when they avoid restrictions that limit public entities. The Fund's bylaws can be found in the appendices.

In 2002, the chief legal counsel of PASSHE requested that all foundations affiliated with State System universities establish clear and separate operations from their parent organizations in order to meet legal tests for independence from their universities. As a result, the chancellor and the Board of Governors have instructed all PASSHE universities to conform to guidelines for establishing independence. Foundations must meet six legal tests for independence. The Fund for West Chester University currently meets all of the tests except for the requirement that the Fund maintain data management systems separate from the University's. This goal will be implemented within the next five years. The Fund for West Chester University and the PASSHE guidelines contribute to the Resourcefulness Transformation in the *Plan for Excellence*, specifically, goal Rf.4., "Diversify and add to the University's financial resource base." Both the Fund and the guidelines contribute to meeting *Characteristics of Excellence* Standard 3: Institutional Resources.

**WCU Conversion to PeopleSoft (Standard 3)**

The PeopleSoft suite of software products was acquired by WCU in 1998, and the financial modules, including General Ledger, Budgeting, Purchasing, and Accounts Payable, were implemented in 1999 in order to resolve Y2K problems with the University's accounting system. Since 2000, the University has gradually been implementing Campus Community Management processes: Student Admissions; Management; Course, Catalog, and Curriculum Management; Student Scheduling; Financial Aid; and Student Financial Management—Billing/Receivables, Student Grading, Student Advisement, and Graduation Processing. Student Advisement, including Degree Audit, is the one PeopleSoft module that still remains to be implemented. Gathering of institutional requirements for this module is underway, and Advisement should be operational in mid-2006.

Enhancements to all PeopleSoft modules and integration with numerous ancillary systems are ongoing. Conversion to PeopleSoft has entailed new infrastructure and intensive employee training. The University administrative computing system contributes to the *Plan for Excellence* Resourcefulness Transformation—specifically, goal Rf.6., "Implement the Capital Facilities and Technology Plans"—and to the *Characteristics of Excellence* Standard 3: Institutional Resources.

**PASSHE Conversion to SAP (Standard 3)**

In 2003, PASSHE implemented the SAP Human Resources and Payroll system. Those elements of Human Resources and Payroll processing that were resident in West Chester University's Model 204 database were migrated to the SAP system. At present, preparations are being made to migrate financial systems to the PASSHE SAP Financial system. The SAP Financial system has limited functionality. At least some PeopleSoft Financial modules will continue to be used, and interfaces between SAP and PeopleSoft will probably have to be developed. There are currently no plans in place to migrate any of the student PeopleSoft applications to SAP Campus Management. It is anticipated that four other PASSHE institutions will implement Campus Management software on a pilot basis in the late 2007-08 timeframe. Migration of student applications to SAP is not within WCU's current operational planning horizons. (Current information from PASSHE projects WCU migrating in 2009-10.) The University's coordination of the SAP system with its own systems supports the *Plan for Excellence* Resourcefulness Transformation and the *Characteristics of Excellence* Standard 3: Institutional Resources.

**Professional Education Unit Restructuring (Standards 4, 5, 11, 13)**

Following lengthy internal discussions and the advice of external consultants, in spring 2005, the president, provost, deans, and faculty involved in teacher education programs moved to restructure the Professional Education Unit in order to enhance communication and leadership for all teacher education programs in all of the colleges. The goals of this restructuring (to be completed by fall 2007) also include ensuring NCATE accreditation, producing well-prepared education students/candidates/teachers, and enhancing the overall effectiveness of the College of Education. The president and provost affirmed that the Professional Education Unit head is the dean of education, that the unit head is responsible for all teacher education courses, and that faculty have dual citizenship (in their content area and in teacher education). The president and provost further stated that a new governance system for teacher education would be developed. The purposes of the new governance system are to advise the unit head on matters pertaining to all teacher education curricula, policies, and procedures; collapse two existing bodies into one, the new Council of Professional Education; provide greater inclusiveness; operate according to a consensus model; and evaluate unit assessment data and plans for improvements. The University held a September 30, 2005, Visioning Conference, and the Council of Professional Education bylaws were adopted later that semester. The newly formed Council of Professional Education began meeting in January 2006.

Restructuring the Professional Education Unit supports the *Plan for Excellence* Resourcefulness Transformation, goal R.3.: "Alignment of Teacher Education Programs with External Standards," and the *Characteristics of Excellence* Standard 4: Leadership and Governance, Standard 5: Administration, Standard 11: Educational Offerings, and Standard 13: Related Educational Activities.

**PASSHE Mandated 120 Credits (Standard 11)**

In spring of 2002, the PASSHE Board of Governors mandated that all undergraduate degree programs consist of no more than 120 credits, with the exception that a very few programs could require up to 126 credits if granted a waiver by PASSHE. All programs were to be at 120 credits by fall 2004. This mandate was intended to improve students' ability to

graduate in four years. At WCU, the mandate impacted all undergraduate programs since previously the minimum number of credits for a bachelor's degree was 128. Departments were requested to adjust their curricula through the normal curriculum revision process during fall 2003 and early 2004. The provost made the decision that the recently revised General Education Program could not be decreased, nor could departments opt out of any general education component. All undergraduate degree programs were revised, and all changes were effective for the incoming class of fall 2004. Three programs received waivers from PASSHE to retain 126 credits: BSEd in Biology, BSEd in Chemistry, and BM in Music Education.

With so many curricula at WCU in professional programs that must meet specialized external accreditation standards, the result has been tighter curricula that give students less flexibility in course selection and fewer opportunities to take electives or a minor. Reducing credits was a difficult task, but faculty proceeded expeditiously. The 120-credit graduation requirement is relevant to the Student Success and Responsiveness transformations in *A Plan for Excellence* and Standard 11 of *Characteristics of Excellence*: Educational Offerings.

## ABSTRACT OF THE HIGHLIGHTS OF THE PRR

The PRR is organized into six chapters following the guidelines of the Middle States handbook. The highlights of each chapter are as follows.

Chapter 1. Executive Summary. West Chester University's PRR updates the 2001 "special topics" self-study based on the University's strategic plan, *A Plan for Excellence*, which has guided the University for the last five years. The PRR provides an assessment of progress to date and prepares the way for revisiting the *Plan* in 2005-06. There have been several major institutional changes since 2001, including changes that were mandated by PASSHE.

Chapter 2. Response to Recommendations. WCU has fully responded to the two recommendations from the 2001 Middle States Team Report, resulting in greater campus-wide understanding of and commitment to the *Plan for Excellence*, a revised general education curriculum, and a general education assessment plan.

Chapter 3. Major Challenges and Opportunities. The narrative is organized according to the five transformations in *A Plan for Excellence*, and discussion of each transformation is keyed to the relevant Middle States standards stated in *Characteristics of Excellence*. The narrative shows that WCU has been guided by its plan to many outstanding achievements on its path towards becoming a national model for excellence for public regional comprehensive institutions. Most of the ten-year goals stated at the end of the 2001 self-study have been met in five years.

Chapter 4. Enrollment and Financial Trends and Projections. WCU has instituted an integrated enrollment management process, and a five-year plan has been developed that proposes growth in graduate enrollments and in the minority student population (both undergraduate and graduate), building upon growth in the undergraduate and minority enrollments in the last five years. Fiscal information shows that WCU is financially sound and able to meet the challenges of the next five years.

Chapter 5. Assessment Processes and Plans. WCU has well-developed plans and procedures for institutional assessment and student learning outcomes assessment. Significant changes since 2001 include revision of the student learning outcomes assessment plan, additional new external accreditations being sought, development of a general education assessment plan for the new curriculum, and enhanced success in meeting PASSHE accountability measures.
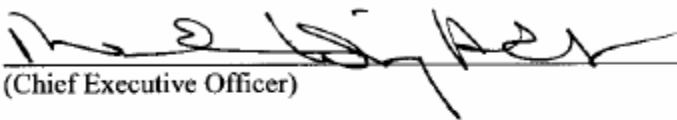
Chapter 6. Linked Institutional Planning and Budgeting Process. *A Plan for Excellence* has guided WCU's budgeting process. The University engages in strategic budgeting through its strategic plan monitoring committee (SPRC), University budget committees, internal grants that tie new initiatives to the *Plan*, and the management evaluation procedure. All other campus plans for specific units are linked to the strategic plan through the five transformations.

# PRR Certification Statement

**WEST CHESTER UNIVERSITY OF PENNSYLVANIA** is seeking REAFFIRMATION of ACCREDITATION.

The undersigned hereby certify that the institution meets all established eligibility requirements of the Middle States Commission on Higher Education and the accreditation standards detailed in *Characteristics of Excellence*.

_____     4/20/06
(Chief Executive Officer)                            (Date)

_____     April 21/06
(Chair, Council of Trustees)                         (Date)

# Chapter 2
## Summary of Institution's Response to Recommendations from the Previous Team Report on the 2001 Self-study

**RECOMMENDATION 1: DISSEMINATION OF *A PLAN FOR EXCELLENCE***

*Despite sincere efforts to share the findings and activities of the strategic planning process, the evaluation team found the five transformations, central to the strategic plan, to be inadequately and inconsistently understood at the institution beyond the level of senior administration and the Strategic Planning and Accreditation Council* [the committee that oversaw preparation of the self-study and *Plan for Excellence*]. *We recommend that the University define the five transformation concepts more clearly and specifically so that all members of the academic community, especially faculty, will share a common understanding of them and be able to take ownership of the strategic plan.* –Middle States Evaluation Team Report, March 2001

**Activities for Dissemination of *A Plan for Excellence* since 2001**

Since 2001, West Chester University has initiated numerous activities to ensure campus-wide dissemination, understanding, and implementation of *A Plan for Excellence*:

- A four-color case statement accompanied the launch of the strategic plan and is still used to explain the *Plan* to various constituencies.

- Each year, the president's fall welcome speech to the campus community addresses the strategic plan. Two of the speeches focused entirely on the *Plan for Excellence*, and subsequent speeches have included references to it—for example, in the Presidential Intentions announced for the coming year. Reprints of the speeches are distributed to the campus community as well as to other constituencies.

- The Strategic Planning Resource Council (SPRC) is a committee of faculty and staff from across the divisions and includes a student representative. SPRC is charged with monitoring the implementation of *A Plan for Excellence*, facilitating communication and discussion about the plan, and making recommendations about its progress.

- Presidential Initiative grants annually provide $50,000-75,000 in funding for faculty and staff projects that will advance the *Plan*'s strategic transformations.

- E-newsletters from the president have included issues about the strategic planning process and about implementation of the *Plan for Excellence*.

- Open forums for faculty, staff, and students were held to introduce and discuss the strategic plan. Workgroups focusing on the individual transformations grew out of the forums.

- Orientation programs for student leaders and new students include an introduction to the *Plan for Excellence*.

- Orientation programs for new faculty and staff also include an introduction to the *Plan for Excellence*.

- Each unit's annual report is organized and presented in terms of the *Plan's* five transformations.

- Bi-monthly divisional reports are likewise aligned with the *Plan's* transformations.

- Budget requests include an explanation of how the funding would advance one or more of the *Plan for Excellence* transformations.

- All management annual performance objectives and evaluations are aligned with the *Plan's* five transformations.

- A link on the homepage of West Chester University's Web site leads to the *Plan for Excellence* and to the homepage for the Strategic Planning Resource Council. This latter page includes information about applying for Presidential Initiative funding.

- Initiatives, projects, and accomplishments that address the *Plan* and its transformations take precedence in the content of the *WCU Magazine*, which is mailed to 55,000 alumni, to the WCU Council of Trustees, and to employees and friends of the University.

- Many marketing decisions are aligned with the transformations.

- During academic year 2004-05, the University's ACE fellow conducted a survey of faculty, staff, and students to assess their awareness and understanding of the *Plan for Excellence*. The survey, which included one-on-one interviews, showed that the various constituencies are familiar with the *Plan* and its concepts.


## RECOMMENDATION 2: GENERAL EDUCATION

*While the self-study discusses general education as a pressing curricular issue, and we do acknowledge that the campus has been working on this difficult task for some time, the team notes that this matter was not resolved at the time of the campus visit. The development of a General Education Program that will encourage lifelong learning and provide the foundation for student success into the twenty-first century is critical and must be given the highest possible priority at the institution.* –Middle States Evaluation Team Report, March 2001

**Process to Address Middle States Concerns**

Since March 2001, West Chester University's Curriculum and Academic Policies Council (CAPC) has worked closely with the administration of academic affairs to address the Middle States team's recommendation and has solicited campus-wide feedback from faculty and students. Based on discussion with the team and the provost, CAPC focused on three specific concerns: coherence, diversity, and assessment. In addition, the revised General Education Program that was implemented following the Middle States visit corrects weaknesses that were still in place at the time of the visit and responds to Student Success goal S.3., "Improve the general education curriculum's focus on developing skills and knowledge that provide a foundation for students' success in their majors, their careers, and their roles as citizens."

**Revised General Education Curriculum**

WCU adopted a new general education curriculum, effective fall 2001. The changes in the curriculum are reflected in the following chart.

## General Education at West Chester University

| Before Fall 2001 (52 hours out of 128) | Fall 2001 and Beyond (48 hours out of 120) |
|---|---|
| Foundations: 10 hours<br>    Composition I<br>    Composition II<br>    Mathematics<br>    Physical Education | Foundations: 12 hours<br>    Composition I<br>    Composition II<br>    Mathematics<br>    Public Speaking |
| Humanities: 9 hours<br>    History/Literature/Philosophy | Humanities: 6 hours<br>    History/Literature/Philosophy |
| Social Science: 9 hours<br>    Psychology/Political Science/<br>    Geography/Economics/Anthropology | Social Science: 6 hours<br>    Psychology/Political Science/<br>    Geography/Economics/Anthropology |
| Science: 9 hours<br>    Biology/Chemistry/Geology and<br>    Astronomy/Physics/Computer Science | Science: 6 hours<br>    Biology/Chemistry/Geology and<br>    Astronomy/Physics/Computer Science |
| Fine Arts: 3 hours<br>    Theatre/Art/Music | Fine Arts: 3 hours<br>    Theatre/Art/Music |
|  | Diversity "J" Course: 3 hours<br>(The "J" course may be drawn from major as well as elective courses.) |
| Interdisciplinary "I" Course: 3 hours<br>(This "I" course may replace any course in the distributive area.) | Interdisciplinary "I" Course: 3 hours<br>(This "I" course may not count for any other requirement.) |
| Free Electives: 9 hours | Directed Electives: 9 hours<br>(These electives are to be chosen in consultation with the major advisor.) |
| **Additional Baccalaureate Requirement:**<br>Writing Emphasis "W" Courses: 9 hours<br>(The "W" courses may be drawn from major as well as elective courses.) | **Additional Baccalaureate Requirement:**<br>Writing Emphasis "W" Courses: 9 hours<br>(The "W" courses may be drawn from major as well as elective courses.) |

## Coherence

Stronger coherence for West Chester University's General Education Program has been achieved by the following:

- The curriculum is based on seven general education goals that underlie the three types of courses: foundation courses, distributive area courses, and courses that address integrating knowledge from diverse perspectives. According to the general education goals, students graduating from the University will be able to

  1. Communicate effectively

  2. Employ quantitative concepts and mathematical methods

  3. Think critically and analytically

  4. Demonstrate the sensibilities, understandings, and perspectives of a person educated in the liberal arts tradition

  5. Respond thoughtfully to diversity

6. Make informed value decisions and ethical choices

7. Be prepared to lead productive and contributing lives

- Clear policies now exist to guide meeting the general education requirements and goals. For example, a student may not use one course to fulfill both a general education distributive requirement and a culture cluster requirement for the bachelor of arts degree. (For a full set of the policies in place, see "Baccalaureate General Education Requirements" in the Undergraduate Catalog.)

- CAPC and the provost have moved to codify future course offerings through the development, refinement, and implementation of cover sheets. The cover sheets provide clear and consistent directions to faculty as they create a syllabus and draft a general education course proposal. Faculty are also encouraged to state in their syllabi which general education goals are being met by a particular course. This move towards more uniform expectations for courses in a given category helps both faculty and students to see how a particular course meets general education goals.

- To improve the dissemination of general education information, CAPC has developed three initiatives: the creation and refinement of handbooks, "best practice" presentations, and the electronic posting of information.

Future goals in the area of coherence include the following:

- Continue to explore ways to help students and faculty identify the contributions that the General Education Program makes to students' education and careers.

- Continue to improve communication of General Education Program information to the broader campus community.

- Continue to identify and celebrate "best practices" in general education courses in order to recognize colleagues for their commitment to teaching excellence and provide models for peers to emulate.

- Continue to garner feedback from faculty about the value of the tools available (cover sheets, handbooks, and electronic postings) to assist them in understanding the General Education Program and in developing general education course offerings.

**Diversity**

Stronger attention to diversity within West Chester University's General Education Program has been achieved by the following:

- The General Education Program now includes a requirement for a diverse communities course (designated as a "J" course). A diverse communities course is defined as a course that educates students about historically marginalized groups (based on gender, race, class, ethnicity, religion, disability, or sexuality), provides a theoretical framework for an analysis of structural inequalities, fosters understanding of difference, and furthers the goal of graduating students who are committed to creating a just and equitable society. To date, 43 courses from 24 departments and programs on campus have undergone rigorous peer review to receive designation as a diverse communities course.

- In addition, through the distributive component of the General Education Program, all students are exposed to the varied modes of inquiry found among the different academic disciplines: the sciences, social sciences, humanities, and arts.

- The "Best Practices in Pedagogy" series has included two presentations on diverse communities courses.

      Future goals in the area of diversity include the following:

- Encourage the development of additional diversity courses.

- Provide additional forums and opportunities for peer dialogue about diverse communities courses and goals.

- Further expand service learning opportunities in the curriculum. This suggestion is based on the premise that any extension beyond the traditional classroom into the broader community inherently affords students greater opportunities for encounters with diversity.

**Assessment**

      Assessment of general education is taking place on both the micro and the macro levels. On the micro level, assessment is being used to help discern the success of individual courses and the full curriculum in achieving the seven core goals. On the macro level, WCU seeks to discover how well the program as a whole is being received and internalized by students. On both levels, once data are available and reviewed, it is given to departmental and program decision makers to help them refine their offerings.

      Key actions and elements in the assessment of West Chester University's General Education Program include the following:

- In May 2004, CAPC approved the General Education Program Assessment Plan. The plan provides templates that map specific measurable subgoals for the seven core goal areas and identify appropriate types of data to be collected, potential points of data collection, and timelines for collection and synthesis of the data and for reporting and implementing findings.

- Beginning in 2005, the University annually examines one or two of the seven core goals in isolation, first using the assessment template with a sample of courses and then looking at the goals across all general education courses. Each year, an additional goal or two will be added to this assessment cycle. The anticipated date for full, active assessment of all of the general education goals is fall 2009.

- Beginning in September 2004, CAPC collaborated with the Office of Institutional Research to devise a survey instrument to discern WCU students' current levels of knowledge about the General Education Program.

- As a result of the Middle States report, and in direct response to the concern that courses appeared to have "lifelong approval," CAPC recommended that the provost initiate a "review and revalidate" or "R2" process.

- As part of the R2 process, for each of their general education courses, departments have listed three core goals that are directly addressed by the course and have provided an

explanation of how the course supports those goals. The information has been submitted to CAPC's Program Review Committee (PRC).

- The collected data provide a snapshot showing which general education goals are covered by which courses. The information reveals, for example, that a large portion of courses advance effective communication and that comparatively few indicate an emphasis on ethical decision making.

- Also as part of the R2 process, all courses that are to be recommended as general education courses have submitted assessment plans to the PRC. Included in the plans are the three core goals to be addressed, multiple assessment tools to be used in gathering data, timelines for data collection, and indicators of changes made. The PRC has created spreadsheets so that data can be entered and review of the information can be made by department and/or by specific goal.

- During the 2004-05 academic year, the PRC reviewed 60 courses. Eleven of these were recommended to CAPC for continuance as general education courses. The PRC identified the other 49 courses as courses whose assessment plans needed additional development. These were returned to the departments for refinement and for resubmission within the next academic year. During the academic year 2005-06, the PRC reviewed 93 course offerings and recommended 24 for continuance. In addition, the committee reviewed all of the courses sent back for revision in the previous year, for a total of over 140 courses reviewed.

- Earlier assessment efforts, prior to the 2001 Middle States visit, resulted in the addition of an oral communication course to the general education foundations requirements.

- To address the vital importance of information literacy for all students, assessment plans now contain specific reference to the assessment of information literacy above and beyond the seven general education goals, which in themselves convey information literacy skills and tools. (For additional information about information literacy, see chapter 5, Assessment Processes and Plans.)

Future goals in the area of general education assessment include the following:

- Draft assessment templates for the remaining general education goals.

- Continue refining the student survey instrument, testing it on larger groups and recording the data in a format that will allow longitudinal analysis.

- Continue the R2 process of overseeing departmental compliance in assessment plan development and in plan modification, implementation, review, and enhancement based on assessment outcomes.

- Continue to explore innovative ways to infuse concepts of information literacy and technology into the curriculum and further refine assessment measures for these competencies.

**Conclusion**

West Chester University provides its students with a solid educational foundation through its General Education Program. Achieving the goals of the program means providing each student with essential skills and knowledge for a successful career and for a meaningful and productive life. While courses in the major directly prepare a student for employment or

advanced education, it is the general education courses that prepare a student to continue to thrive and adapt effectively as individual, work, and world situations change.

The political and logistical, as well as pedagogical, issues relating to general education are complex, and the University has navigated some rough waters in the past five years. WCU, however, is encouraged by the effective program that is now in place and by the commitment to its continuous improvement and excellence. The Middle States self-study served as a catalyst to produce healthy and collegial dialogue. In the coming years, West Chester University will use assessment to refine the General Education Program and to fulfill the goals of the Student Success Transformation in the *Plan for Excellence*. (Relevant appendices include the WCU Undergraduate Catalog and the General Education Assessment Plan.)

# Chapter 3
# Major Challenges and Opportunities

The narrative reviewing the past five years at West Chester University is organized according to the five transformations in *A Plan for Excellence*. Each transformation is linked to the relevant Middle States standards from *Characteristics of Excellence*.

## THE RESPONSIVENESS TRANSFORMATION

The Responsiveness Transformation states, "West Chester University will increase its responsiveness to the educational and cultural needs of its region." Supporting the Responsiveness Transformation are five goals:

R.1.    Ensure responsive curricula and services, including more pre- and post-baccalaureate professional-growth opportunities and post-baccalaureate certificate programs.

R.2.    Accommodate the needs of diverse learners by providing courses, programs, and services in a variety of formats and venues.

R.3.    Align teacher preparation programs with national accrediting, System, and state standards; the recommendations of major national reports such as those recently issued by the American Council on Education and the Pew Foundations; and regional and national K-12 needs.

R.4.    Expand the University's role as a center for the cultural arts in Chester County.

R.5.    Increase opportunities for connections with and among alumni/ae.

At West Chester University, the desire and energy for responsive change are strong, as evidenced by the number of new initiatives, partnerships, programs, and other activities across the University and in each of the Responsiveness Transformation goal areas. It should be noted that activities supporting the Responsiveness Transformation and its five goals may also support one or more of the other *Plan for Excellence* transformations.

### Goal R.1. – Responsive Curricula, Programs, and Services

By 2001, West Chester University already had in the pipeline or had recently developed a number of new programs and initiatives that support the needs of students, residents, and employers in the region. Six examples will illustrate the high level of responsiveness represented:

1.  The interdisciplinary Pharmaceutical Product Development (PPD) baccalaureate degree program has been designed and implemented with the direct participation of industry representatives and was the first program of its kind in the world. The curriculum earned the Eastern Technology Council's Enterprise Award for the best new educational program in Greater Philadelphia. With the majority of the world's largest pharmaceutical companies located within a 50-mile radius of Philadelphia, the University was quick to respond to their

request for such a program. What normally would have been a three-to-four-year approval process was completed in eighteen months.

2. The Technology and Electronic Commerce master of business administration program (TEC MBA) was the region's first graduate degree in e-commerce. A dean's business advisory council consisting of more than 20 regional business executives provides input into curricular development and overall program objectives.

3. The Applied Statistics graduate program has exceeded all enrollment expectations. The students have been offered internship positions by many leading regional employers, such as Cephalon, Fox Chase Cancer Center, GlaxoSmithKline, Omnicare Clinical Research, Paragon, Sanofi Synthelabo, and Wawa. The program also includes active on-campus collaboration, with statisticians serving as speakers, co-teaching classes, and delivering guest lectures. Every applied statistics student who graduated in the spring or summer of 2005 has secured employment in some capacity related to statistics.

4. For physicians, the College of Health Sciences offers continuing medical education (CME) courses in integrative holistic medicine, sports medicine, and other content areas. Nationwide, WCU is one of only six universities without a medical school to be fully accredited as a CME provider.

5. Among WCU's graduate certificate programs are nine approved in just the past two years: Business Ethics, Health Care Ethics, Music: 21$^{st}$ Century Education, Music Technology, Piano Pedagogy, Geographic Technology, Information Systems, Web Technology, and Computer Security. In addition to the certificate programs offered by the colleges, the College of Business and Public Affairs' Corporate Programs office offers courses in community planning and management development.

6. The Information Assurance Center provides students, other individuals, and organizations with information and with education and training in cyber-threat responses and such information technology issues as protection, compliance, ethics, and privacy. The National Security Agency designated West Chester University as a National Center of Academic Excellence in Information Assurance for 2004 through 2007.

Programs and initiatives such as those described above are crucial successes of the Responsiveness Transformation and demonstrate the University's ability to react quickly to external demands brought about by changing political, economic, and social trends. Moreover, it has been a priority of the administration that budgetary restrictions—especially tight from 2002 through 2004—not limit the University's ability to be responsive in terms of new programs, curricula, and other opportunities.

The University's commitment to the distributed leadership model supports and inspires responsiveness. Under distributed leadership, everyone is responsible and accountable for leadership within his or her area. Formal authority and accountability are decentralized. Distributed leadership has ramifications in virtually all aspects of campus life. Good ideas come from throughout the University, and many people cooperate in creating meaningful change. Reflective of distributed leadership, the deans and respective college faculties have taken responsibility for developing and implementing many of the newest activities. In addition, the Office of Sponsored Research has taken on an expanding role as a focal point for funding

Responsiveness initiatives; in the last four years, Sponsored Research has secured close to $17.5 million from external funding agencies.

**Goal R.2. – Accommodation of the Needs of Diverse Learners**
*Definition of "Diverse Learners."* The first challenge in achieving goal R.2. was to define the broad concept of "diverse learners," which clearly encompasses a wide range of factors, from the students' age to their ethnic background and from the presence of learning or physical disabilities to the need for flexible course schedules or distance learning opportunities.

In response to the need for a clear definition and other concerns raised by the Strategic Planning Resource Council (SPRC), the provost created a Diverse Learners Taskforce that was charged to develop the University's definition of "diverse learners," to determine whether and to what degree the University was meeting diverse learning needs, and to make recommendations. Additional efforts were made to advance distance learning initiatives and to consider how distance learning would fulfill, in part, the needs of one subset of diverse learners; a new graduate dean was hired to provide further focus and leadership to this area of continuing and adult education.

The Diverse Learners Taskforce worked throughout the 2003-04 academic year and presented its findings in the fall of 2004. Their report identified weaknesses in the area of services for diverse learners and offered recommendations about how to move forward. Perhaps most importantly, the taskforce came to an accepted definition of diverse learners:

> West Chester University defines **diverse learners** to mean those students who have disabilities, life circumstances, or language and cultural attributes that necessitate flexibility in educational approach. We understand these characteristics of diverse learners to be as follows:
>
> 1. Disabilities—learning, mobility, psychological, visual, and hearing, in addition to chronic illness and ADD/ADHD
>
> 2. Life Circumstances—older, returning, and nontraditional students, including non-degree-seeking and part-time students, commuters, and those with limited socio-economic resources
>
> 3. Language and Cultural Factors—English as a second language, gender, international student status, race, ethnicity, religion, and sexual orientation

*Universal Design for Learning.* The Diverse Learners Taskforce recommended Universal Design for Learning (UDL) as a framework to use when designing or revising instruction for maximum responsiveness to all learners. The taskforce believed that the usefulness of the UDL framework is not limited to instruction but can also be applied to the University on all levels—courses, programs, and services. In addition, the taskforce recommended that the University's focus be inclusive, noting that this inclusiveness can benefit the entire University community in the following applications:

1. Equitable Use: Courses, programs, and services are accessible to all people defined as diverse learners.

2. Flexibility: Courses, programs, and services are designed to accommodate a wide range of diverse learners—i.e., a wide range of methods, activities, and approaches.

3. Clarity: Courses, programs, and services are designed for ease of use and are clearly visible across campus so that diverse learners know what resources are available to them.

4. Climate and Community: Courses, programs, and services promote interaction among students, faculty, staff, and administrators and are welcoming and inclusive.

Finally, the taskforce recommended developing a committee charged with promoting UDL principles across campus and providing guidance to the University community in its practices and philosophy. Released time would be provided for the committee's coordinator. In 2005, the provost approved this recommendation.

**Goal R.3. – Alignment of Teacher Education Programs with External Standards**
*Program Enhancements.* Consistent with West Chester University's history as a teachers college, teacher education remains among the institution's priorities. The College of Education (COE) continues to evolve rapidly in the face of numerous external pressures—specifically, National Council for Accreditation of Teacher Education (NCATE) standards, PASSHE guidelines, federal mandates such as No Child Left Behind, and the demanding and frequently revised Pennsylvania Department of Education (PDE) standards.

The COE continues to be among the vital, energetic, and successful core components of the University's overall responsiveness. The college has, for example, established the permanent management positions of associate dean/NCATE coordinator and assessment coordinator. The COE has also developed and approved the Conceptual Framework (CF) and the Knowledge Base and Unit Outcomes for teacher education candidates. Subsequently, the CF has been incorporated into major unit assessments, and teacher education courses have also been aligned with the CF. Additionally, the CF is reflected in critical performance assessments of candidates in programs and courses and is integrated into measures and standards for monitoring candidate development. Finally, the CF has been applied to field experience placements and evaluation.

Among its additional evidence of responsiveness, the College of Education has

- Achieved continued high pass rates on the Praxis exams

- Established an NCATE Steering Committee

- Under the direction of the associate dean/NCATE coordinator, identified six unit assessments for use in demonstrating candidates' knowledge, skills, and dispositions for the NCATE review

- Aligned the Student Teaching Evaluation form with the Conceptual Framework and the Pennsylvania Statewide Evaluation Form for Student Professional Evaluation and Practice

- Hosted a successful mock NCATE visit in spring 2005, and hosted successful NCATE and PDE site visits in spring 2006

In another notable example of responsiveness, the governance of teacher education programs at WCU has been restructured. During spring 2005, following lengthy internal discussions and the advice of external consultants, the president, provost, deans, and faculty

moved to restructure teacher education governance in order to enhance communication and leadership for all teacher education programs in all of the colleges. The newly formed Council of Professional Education began meeting in January 2006. See the summary of major institution changes in chapter 1 of this report.

*The 3E Institute.* The College of Education has been successful in seeking and winning large external grants to support their new and enhanced programs. Among these programs with grant funding is the Institute for Educational Excellence and Entrepreneurship (3E Institute), which is funded by a Fund for the Improvement of Post-Secondary Education (FIPSE) grant of close to $400,000. The 3E Institute is a center for identifying, supporting, and mentoring entrepreneurial educators who collaborate with colleagues, parents, business, and the community to meet the needs of all students. The institute's Educator 500 program, for example, identifies, honors, and supports innovative educators who demonstrate the unique 3E Institute model. Already more than 350 undergraduate and graduate teacher-education students have participated in the Entrepreneurial Educator Seminar Series featuring past Educator 500s. In addition, WHYY public television has produced and aired 11 interstitials profiling members of the Educator 500.

The 3E undergraduate courses, which cover a range of topics, have served about 300 students—and to date, more than 300 business and corporate partners have contributed time, money, and expertise to support 3E Institute efforts. For the second year, the 3E Digital Community has been funded by both a WCU Presidential Initiative grant and a School District of Philadelphia University Partnership grant. And for the region's schools, during summer 2005, the 3E Institute trained 88 Philadelphia and Chester County teachers and administrators in the Entrepreneurial Educator and the Emerging Sciences and Technologies institutes. The participating teachers brought a project or program idea to the institute and learned how to develop the idea into an effective business plan that could be implemented. Most participants succeeded in obtaining incubator or seed grants to launch their educational business plan.

*Other Program Partnerships.* COE faculty are also actively involved in other partnerships and collaboration with the suburban and urban communities served by the University. Following are illustrative examples:

What began as WCU's "adopt a school" project offering an on-site master's degree in literacy for the teachers of Philadelphia's Bartram Cluster has evolved into a  P-16 initiative for the East and Southwest academic regions of the School District of Philadelphia, the Community College of Philadelphia, and Holy Family University, as well as for Cheyney and West Chester universities. West Chester University is the lead institution in this P-16 initiative. With support from a Pennsylvania Teacher Quality Enhancement grant, faculty and students from WCU's College of Education are working to transform three elementary schools and a middle school of the Southwest region, where WCU faculty and district staff team teach graduate-level literacy and mathematics courses for the teachers. WCU teacher candidates are placed in these schools for their reading practicum and for student teaching. Teacher candidates work alongside University faculty and practicing professionals in implementing best practices.

Through a contract with the School District of Philadelphia, WCU is offering an on-site certification program in special education that provides district personnel with the opportunity to qualify for Pennsylvania teacher certification.

In a collaborative venture between IBM and WCU's Preparing Tomorrow's Teachers to Use Technology grant-funded initiative, WCU teacher candidates use IBM software to mentor elementary- and middle-grade students in the Southwest Academic Region of Philadelphia.

In January 2005, Early Childhood Education began offering a bachelor's degree completion program in Philadelphia to a first cohort of 30 students. Students enrolled in this program receive scholarship money for tuition and books from the Pennsylvania Association of Child Care Agencies. The students must be currently employed in child care for at least 30 hours a week and must have completed the associate's degree. A second cohort had a start date of January 2006.

**Goal R.4. – WCU as a Center for the Cultural Arts**
Since 2001, substantial energy and activity have continued to be directed toward enhancing the University's role as a regional center for the cultural arts. Already, more then 50,000 people annually visit the University's exhibits and attend cultural arts events. Now the current construction and fundraising for the new Swope Music Building and the Performing Arts Center are especially notable indicators of achievements and future opportunities in this arena. In addition to performance and recital halls and a new art gallery and library, the building will include rehearsal and practice space, music laboratories, classrooms, and faculty studios and offices.

A facilities feasibility study is now being completed to finalize plans to relocate Art Department offices and classrooms to the E.O. Bull Center, which is adjacent to the new arts building and contains two theatres and the Department of Theatre and Dance. The result will be a consolidated arts complex on the southeast side of campus. Once these two projects are completed, West Chester University will offer performing venues second in the region only to those on Philadelphia's Avenue of the Arts.

As noted in chapter 1, a new College of Visual and Performing Arts was created in 2004, consisting of the Department of Art, the Department of Theatre and Dance, and the School of Music. Under the leadership of a single dean, the departments are gaining synergy for a unified approach to marketing, production, presentations, and the utilization of resources for a wide range of visual and performing arts programs and activities on campus and throughout the region.

A number of additional significant events and activities over the last five years also demonstrate the successful implementation of goal R.4. Collaboration with outside agencies and groups in the cultural arts community (the Brandywine Ballet, Kennett Symphony, Gilbert & Sullivan Society, and Delaware Symphony, for example) and a focus on boosting attendance at cultural arts events were among the initial objectives set in this area. The arts partnerships help to secure external funding and provide additional opportunities for cultural arts offerings, curricula and program development, and presentations by notable professional artists.

Since 1995, West Chester University's Poetry Conference, "Exploring Form and Narrative," has grown to become the nation's largest annual summer poetry conference and has received international recognition for its excellence. The success of the conference led to the creation in 2000 of the West Chester University Poetry Center, which has initiated an annual poet-in-residence, a poetry reading series, and numerous academic and performance activities. In 2003, the center received a $300,000 National Endowment for the Humanities Challenge Grant to support its programs. The matching funds required to fulfill the challenge will be raised by the end of 2006, creating a $1.2 million endowment to support the center's activities. In addition, the center received a $250,000 endowment gift from a local resident to establish the annual Iris M. Spencer poetry awards.

High visibility for the University's student and faculty artists and performers is further being achieved through such means as the School of Music's annual concert in Philadelphia's Kimmel Center for the Performing Arts.

To foster and restore cultural programs within the School District of Philadelphia, the College of Visual and Performing Arts has established the Samuel Barber Partnership for Music Education. The partnership will provide WCU music education interns for 81 Philadelphia elementary schools that currently do not have classroom music taught by music specialists. Other elements of the partnership are in the early planning stages. These include possible participation by Philadelphia schoolchildren in WCU summer music, art, and drama day camps; participation for college credit by selected public schoolchildren in the WCU Symphony Orchestra; and the immediate availability of WCU artist faculty to provide, free of charge, concerts at general assemblies throughout the School District of Philadelphia. In addition, WCU artist faculty perform regularly in the Academy of Music Ballroom, and these concerts will also be available free of charge to Philadelphia residents.

**Goal R.5. – Opportunities for Alumni**

To provide greater focus and energy in the area of alumni connections and lifelong learning, a number of new initiatives were launched just prior to and shortly after the release of the *Plan for Excellence*. For example, a successful project was launched to recover lost alumni. More than 8,000 names and addresses have been entered into a database to reflect their most current contact information.

In addition, an online community for alumni helps former classmates reconnect, provides links to educational and employment services and other benefits, displays a calendar of cultural events and alumni get-togethers, and gives updates on the work of alumni groups. Alumni receive a convenient event-registration link, free e-mail opportunities, alumni directories, current campus newsletters, and links for nominations to the Alumni Association Board of Directors. The site includes a link to make a contribution, and a "get involved" section will soon be added. The online community has increased its registered users by 100-150 users per month over the last two years, and a total of more than 6,000 registered users now participate.

On campus, more alumni events now encourage participation by all age groups. For instance, Homecoming and Alumni weekends include more family events. Off-campus, such alumni events as after-work business card exchange social gatherings have been added.

**Summary and Outlook**

West Chester University is meeting or exceeding the goals of the Responsiveness Transformation. Under the distributed leadership model, West Chester University remains well situated to respond quickly to opportunities and challenges presented by the external environment. Funding cutbacks that are beyond the University's control make sustaining responsiveness difficult, and there are many private higher education competitors in the area who can respond nimbly to regional needs. In response, the deans are seeking greater autonomy in their ability to redirect resources towards exciting and responsive new programs (which may be complicated by the introduction of the new SAP Financial software). Strategic responsiveness will need to include the reallocation of present resources within the colleges, rather than the expansion of responsibilities within a context of fixed, and sometimes diminishing, resources.

The Responsiveness Transformation is ready for an anticipated second wave of more internal, consolidating change. The *Plan for Excellence* opened a floodgate of new campus responsiveness initiatives. Now, five years after the primary burst of activity, is the time to review, reevaluate, and reassess the progress of that first round of responsiveness initiatives. Moreover, the University needs to monitor and assess all new initiatives for their quality, now that sufficient seed time has passed for objective assessment. Successful program initiatives that continue to show yearly growth should be prioritized for expansion funding and resource allocation.

There are several additional areas of responsiveness that suggest further attention:

- Continued funding for marketing and public relations

- A plan that ties together the overall University mission and goals to prioritize specific new responsiveness initiatives

- Monitoring of the operation of the new Council of Professional Education to ensure the success of the teacher preparation programs

- The continued recognition, accommodation, and advancement of diverse learners

- Continuation of efforts to enhance and strengthen connections to alumni

**Middle States Standards Relevant to the Responsiveness Transformation**

*Standard 1: Mission, Goals, and Objectives.* The Responsiveness Transformation clearly articulates the constituencies served by the University and the nature and parameters of that service.

*Standard 2: Planning, Resource Allocation, and Institutional Renewal; Standard 3: Institutional Resources.* Because the Responsiveness Transformation articulates priorities for the University, these priorities are available—and are used—as a rationale for resource allocation and for planning and assessment within programs. In addition, the Responsiveness Transformation supports growth and innovation in line with the University's mission, vision, and values.

*Standard 4: Leadership and Governance.* The University's distributed leadership model directly promotes and supports responsiveness throughout the institution.

*Standard 11: Educational Offerings; Standard 13: Related Educational Activities.* The University's commitment to responsiveness promotes partnerships and other close collaboration with the region's business, educational, and nonprofit communities. These ties inspire and inform program development—for example, through advisory boards.


## THE STUDENT SUCCESS TRANSFORMATION

Supporting the Student Success Transformation's commitment, "West Chester University will make student success its defining characteristic," are seven goals:

S.1.   Enhance curricula and instructional modes that actively engage learners in connecting theoretical and applied knowledge and improve the quality of their learning.

S.2.   Achieve greater student socialization into the academic culture, involvement in campus life, and integration of academic and co-curricular programs.

S.3.   Improve the general education curriculum's focus on developing the skills and knowledge that provide a foundation for students' success in their majors, their careers, and their roles as citizens.

S.4.   Integrate assessment into all curricular and co-curricular programs and student services.

S.5.   Strengthen the links between undergraduate academic and career advisement and programming.

S.6.   Improve retention, graduation, and time-to-degree rates by assisting students during key transitional periods in their academic careers.

S.7.   Systematically examine and apply processes and programs that are proven to reduce disparities in graduation rates of students between underrepresented minority and Caucasian students.

As the cornerstone of the *Plan for Excellence*, the Student Success Transformation shifts the traditional strategic focus of measuring faculty and staff effectiveness to that of facilitating student learning. During the creation of the *Plan for Excellence*, much discussion focused on the nature of student success in today's higher education environment, in general and at West Chester University. While it was recognized that academic success is important, it was determined that other measures of success are also significant. What emerged from the discussion were the above goals, which were intended to facilitate a paradigm shift in WCU's approach to defining student success and the role of the University in aiding that success.

**Goal S.1. – Enhanced Curricula and Instructional Methods**
As the following examples illustrate, since 2001, enhanced curricula and instructional methods have helped to promote success for a wide array of students and meet student needs that range from effective career preparation to course offerings that support the requirements of mid-career professionals:

The Master of Public Health program enables students to develop skills and apply knowledge from multiple disciplines for the promotion and protection of health in human populations and to serve as effective practitioners and leaders in the fields of community health,

healthcare administration, environmental health, or integrative/preventive medicine. A community advisory committee acts as a sounding board for new ideas and input into the program and certifies its overall effectiveness in meeting the needs of the region. In addition, a student advisory committee within the MPH program promotes student involvement in assessment and governance of the degree. Degree graduates enjoy a near 100 percent placement rate. An accelerated format including evening courses and the ability to earn the degree in one year support the educational needs of practicing professionals. The Integrative Health track within this program is the first accredited track of its kind in the country.

West Chester University has been a lead member in a demonstration project working with other Educational Technology Consortium members and with campus faculty to develop online course work. This partnership unites the capabilities and resources of Greater Philadelphia academic institutions, Philadelphia's WHYY public broadcasting station, and the software company WebStudy to provide educational technologies to consortium members. The current agreement among the consortium members expires June 30, 2006. WCU is using the benefits of that project to move forward with enhancing technology-based instructional systems for the future.

The Samuel Barber Institute for Music Educators offers an innovative combination of traditional academic courses and special subject seminars featuring nationally known leaders in music education. Courses can be taken either in traditional semesters or in a schedule tailored for music educator professionals.

In academic year 2004-05, for the third year in a row, more than 3,000 WCU students were enrolled in service learning courses. Service learning initiatives are developed in conjunction with the Office of Service Learning and Volunteer Programs and are implemented through specific courses. Through these experiences students become more informed about and connected with their community. In a recent survey of service learning students, participants either agreed or strongly agreed that the service learning experience had enhanced their understanding of the subject matter of the course; given them a greater understanding of diversity; benefited both them and others; affirmed the value of treating individuals with civility, respect, and courtesy; helped them to make logical and ethical judgments; and helped them to learn to communicate more effectively with others. In 2001, WCU's Service Learning Program was commended as a "best practice" by the Middle States Self-study review team.

Curricula and instructional modes have been enhanced through technology. For example, 2004-05 saw a 14% increase in students using Blackboard course management software compared to the year before. Also in 2004-05, the number of faculty using Blackboard or requesting training and support represented a five-fold increase from 2003-04. The addition of a 24/7 Blackboard Help Desk has helped students and faculty resolve technical issues associated with daily use of the course management system while allowing the instructional designer to provide enhanced pedagogical support and training.

Academic Computing recently installed computers and other technology and equipment for 52 presentation rooms. Presentation rooms consist of a wall-mounted control system with a connection to the local area network (LAN) and Internet services, sound system, ceiling-mounted

projection system, and controller. The room total is a 100% increase over the number of available presentation rooms in 2003-04. Consequently, any faculty member or lecturer can now plug in his or her laptop and make use of the connectivity and computer availability. Also installed were an additional 18 multimedia rooms.

A specialized lab, the Digital Corner, has been established in the Academic Computer Center for the production of multimedia-enhanced classroom assignments. Graphic applications and specialized equipment are available for student and faculty use. In conjunction with the Digital Media Center, the Digital Corner offers students a wide range of software and services, including MS Office, image and document scanning, Web page management, video editing, and MS Moviemaker.

To keep pace with new academic programming, West Chester University has dedicated staff and resources to the renovation and construction of new academic facilities. For example, the Biology Department recently completed a geological microbiology and molecular biology laboratory, one of the nation's first fully equipped facilities of its type. The University has received requests for use of the lab from scientists at the Princeton and Oak Ridge National laboratories.

As a result of several requests from physics majors, the Physics Department has provided its students with 24/7 electronic-keyed access to specialized laboratories, classrooms, and a collection of books and journals. The students can conduct laboratory experiments, complete assignments, and continue ongoing research. Often these activities require more time than allotted for class and laboratory sessions.

Other programs and initiatives that advance goal S.1. are presented under Responsiveness Transformation goals R.1. and R.2. and Human Capital Transformation goals H.1.-H.5.

**Goal S.2. – Greater Student Involvement**
Greater student involvement and engagement supports student success in the classroom and beyond. Among WCU programs that notably encourage student involvement are service learning (discussed under goal S.1.), the Honors Program, the Co-curricular Portfolio, the Learning Communities Project, student leadership programs, and a number of other opportunities for students, examples of which are cited below.

The Honors Program prepares students to become leaders in scholarship, service, and teamwork and motivates students to engage in lifelong learning. Current membership includes students from 44 different academic majors. Applicants to the University who have at least two of the following are invited to apply to the Honors Program: a minimum high school grade point average of 3.5, minimum SAT score of 1,200, top 20% rank in the student's graduating class, and record of achievement in high school honors or advanced placement courses. Honors Program students are expected to complete a 27-credit honors core curriculum and a three-credit capstone independent research or service learning project. For an honors project in 2004, 18 students visited South Africa. The WCU students and faculty conducted a community needs assessment for an impoverished township, interviewing grandmothers who had primary care of

grandchildren orphaned from AIDS. Students from the trip were then among the presenters for the fall 2004 honors seminar, Personal Leadership Development: Insights from South Africa.

The Co-curricular Portfolio affords students the opportunity to document relevant co-curricular activities and experiences (for example, paraprofessional work, leadership, involvement in organizations, honors and awards, professional development, and service learning) on their transcripts. Student feedback has reported positive responses from potential employers and has indicated that the portfolio is a valuable asset for applying to graduate school or a professional position. During 2004-05, more than 200 students elected to participate in the Co-curricular Portfolio initiative, twice the participation for the project's introductory year, 2003-04.

Established in 1998, the Learning Community Project is a living-learning experience in which 25 students from one major are block scheduled into one to three courses for the fall semester and are assigned to live on the same floor in a residence hall. In fall 2005, five majors participated in the Learning Community Project: biology, Spanish, English education, art, and psychology. A learning community for pre-major students living on campus was also offered. Planned for fall 2006 is a pre-major commuter learning community. Observed benefits of participating in learning communities have been the establishment of positive student and campus connections leading to improved retention and graduation rates, increased contacts with faculty and student services staff, additional access to study sessions and faculty outside of class, and an improvement in academic performance. In 2001, WCU's Learning Community Project was commended as a "best practice" by the Middle States Self-study review team.

WCU recently celebrated the 20th anniversary of the annual student leadership conference/experience, which is held each spring semester with an attendance of about 150 students. In the last few years, the Leadership Project Team (composed of students, faculty, and student affairs staff) has developed a number of programs, such as the SAIL (Students Actively Involved in Leadership) series, which offers programs on leadership skills to students on a regular basis during the year. In summer 2005, a new Student Leadership and Involvement Office was established in the Division of Student Affairs to give greater emphasis and commitment to leadership development for students, and the division has made a commitment to expanding leadership development programs through the establishment of the Student Affairs Endowment Fund.

Research initiatives for students and faculty encourage collaborative student-faculty research projects and creative experiences, promote collaboration among PASSHE campuses, provide students with the opportunity to be conference co-presenters, and enhance and improve the teaching skills of participating faculty. Current initiatives include the Student/Faculty Research Initiatives, PASSHE Summer Academy for Teaching, Frederick Douglass Institute, and specific departmental programs. The West Chester University Research Consortium organizes an annual West Chester University Research Day, which features faculty, student, and staff authors and co-authors of research and creative projects. In spring 2005, 35 presentations or poster sessions were conducted during the program.

Among the WCU programs that encourage involvement are the ever-increasing student clubs and campus organizations, which now number more than 200. In addition, students are actively involved in community service activities and volunteer thousands of hours (and dollars) to local agencies and charities. Recreation activities also foster student involvement through an extensive intramural program, a fitness center, and an aerobics program. West Chester University is proud of its intercollegiate athletic program, which has a rich history and currently involves more than 500 student athletes participating in 14 women's teams and 10 men's teams.

Paraprofessional positions have been another effective route to engage students in learning experiences and campus life. The Division of Student Affairs employs more than 150 students in these roles (e.g., resident assistants, orientation leaders, Sykes Student Union staff, and multicultural peer mentors) and has expanded efforts in working with these students to link their work experience to their future career goals.

**Goal S.3. – Stronger General Education**
See chapter 2, Institutional Response to the Recommendations: General Education.

**Goal S.4. – Campus-wide Assessment**
See chapter 5, Assessment Processes and Plans.

**Goal S.5. – Stronger Academic and Career Advising**
The effectiveness and delivery of academic advising is being examined closely, and the University Academic Advising Committee was assembled in 2004. Among the responsibilities of the committee are establishing a meaningful faculty-advisor development program and creating and identifying the guiding principles for advising on campus (mission statement, vision/philosophy statement, advisor handbook, and Web resources). In addition, each academic department has identified a liaison to the University Academic Advising Committee, and several workshops for the advising liaisons have been conducted. A separate taskforce was convened to develop an advising effectiveness evaluation instrument, which was piloted in May 2005 and April 2006. The instrument provides feedback on the effectiveness of each academic advisor and the advising program as a whole. It is hoped that, once the instrument has been approved and adopted, the data from the instrument will be useful for faculty as a learning tool.

As a result of changes in the language of the system-wide collective bargaining agreement with faculty, University staff members may now provide academic information to a greater degree than was previously allowed. While not crossing the line into academic advising (which is still identified as a faculty prerogative), staff now may provide students with answers to basic questions regarding academic programs and policies. Various constituencies across campus have been trained in giving such information.

The Twardowski Career Development Center (Division of Student Affairs) and the Pre-Major Academic Advising Center (Division of Academic Affairs) have enhanced their working relationship and have jointly provided career exploration workshops and presentations to undeclared/undecided students as well as to parent groups. Pre-Major Advising faculty have also been introduced to the FOCUS Web-based career exploration computer program so that they are

able to refer students to that resource, which is funded by the Twardowski Career Development Center and available through the department's Web site.

In each of the last three years, West Chester University placed more than 4,000 students in internships, with more than 95 percent of these in Pennsylvania businesses, schools, and organizations. The internships provide students with extensive insight and experience that are valuable background for choosing and establishing a career.

The Professional Education Unit has developed several assessment instruments to evaluate student teachers, field experiences, and other educational internships. The instruments survey both the student and the supervisor, and any gaps that are identified between the perceptions of both raters are used as learning and teaching tools.

A self-service resource, the Ask the Ram service, has been implemented on the WCU Web site. The purpose of this service, which is powered by EMT-Hobson software, is to provide undergraduate students with online access to academic affairs information about policies and procedures. The Ask the Ram service addresses students' requests for immediate and easy access to accurate information in the areas covered. More than 3,000 questions were posed during the first eight weeks of implementation.

**Goal S.6. – Support for Improved Retention and Graduation Rates; Goal S.7. – Improved Graduation Rates for Students from Underrepresented Groups**

West Chester University currently ranks in the 91st percentile for one-year retention and six-year graduation rates for public Master's I schools in the Consortium for Student Retention Data Exchange (CSRDE). Programs to enhance the retention and graduation rates for all West Chester University students continue to evolve.

Among these programs, WCU summer orientation was redesigned in 2004 and currently consists of two sessions. A one-day session is conducted in July, and the second is scheduled for three days just prior to the start of the fall semester. New students meet with academic advisors and are thoroughly exposed to the campus, campus life, and the student service areas so that they are connected to the University community from the onset of their academic career. The 2005 hiring of a full-time director of new student programs should facilitate ongoing improvement of the orientation offerings.

For nearly a decade, the Office of Multicultural Affairs has conducted a Summer Institute for 40-60 new students. The Summer Institute is designed to assist the Pennsylvania Board of Governors scholarship awardees with the transition from high school to the collegiate environment. During the sessions, which take place one week before the start of the fall semester, students learn about campus resources and discuss academic-success issues. Yearly evaluations indicate that the program is effective.

The Office of Multicultural Affairs is in its ninth year of a mentoring program that matches incoming multicultural students with faculty/staff and peer mentors. The program has had a four-year graduation rate that is significantly above University-wide figures for multicultural students.

The Retention Committee undertook two spring 2005 initiatives designed to assist WCU's retention efforts. The first initiative was a review of Asian American students who entered the University over the last five years. The review examined their academic progress and persistence at the University. On previous campus climate surveys, this group appeared to be the least satisfied with the WCU climate. A second initiative focused on customer service workshops for summer 2005, with a special emphasis on assisting multicultural students.

The Learning Assistance and Resource Center (LARC) provides individual and group tutorials tailored to students' learning needs, student success seminars, and supplemental instruction for introductory science courses. Review workshops for the Praxis have now been extended to ten weeks to allow the coverage of more academic content. A study of the performance of students who participated in spring 2005 LARC tutoring and workshops found, for example,

- A 20% decrease in biology and chemistry course failures

- An 11% increase in the Praxis mathematics scores

- A 74% enrollment in post-graduate study by LARC tutors graduating from the University

The Academic Development Program (ADP) provides intensive tutoring, counseling, and academic support in the first year to students who do not meet current admissions requirements but have demonstrated strong academic potential. Features of the program include a six-week mandatory summer session; specialized courses to enhance skills in reading, writing, speaking, mathematics, and critical thinking; and individual advising. In addition, because about half of the ADP students have undeclared majors, the Twardowski Career Development Center collaborates with ADP to provide training sessions for peer mentors and to encourage participation in job fairs and career exploration activities. Such intensive intervention has resulted in the ADP cohort having a better second-year retention rate (87%) than the overall first-year cohort (82%). Moreover, in the courses for which they received mandatory tutoring, ADP students score higher than their non-ADP counterparts.

The Partners in Prevention program was established in 2001 to aid students struggling with alcohol or drug issues. Faculty, staff, and students who participate in the program are trained to recognize the symptoms of chemical abuse and dependency and to refer students who exhibit these symptoms to appropriate sources of help, both on and off campus.

**Summary and Outlook**

The American Association of State Colleges and Universities Graduation Rate Outcomes Study, which examines reasons behind some public institutions' excellent retention and graduation rates, concludes that "What is distinctive among institutions with high graduation rates is the overall campus culture within which these practices are deployed, and the quality of presidential and administrative leadership that keep them moving and coordinated."[1] West Chester University's activities in support of the Student Success Transformation go a long way toward achieving a coordinated, pervasive approach. The outlook for the future is positive, in

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[1] http://www.aascu.org/GRO/docs.htm

spite of anticipated challenges, particularly in the area of funding. There is a concern among faculty about reliance upon external funding and increased competition for available internal funds.

**Middle States Standards Relevant to the Student Success Transformation**
*Standard 9: Student Support Services.* In direct support of Standard 9, the Student Success Transformation commits the University to improving retention, graduation, and time-to-degree rates by assisting students during key transitional periods in their academic careers.

*Standard 11: Educational Offerings.* By enhancing curricula and instructional methods that help students connect theoretical and applied knowledge and improve the quality of their learning, the Student Success Transformation advances Standard 11.

*Standard 12: General Education.* By improving the WCU general education curriculum's capacity to develop skills and knowledge that provide a foundation for students' success in college, careers, and life, the Student Success Transformation advances Standard 12.

*Standard 13: Related Educational Activities.* In support of Standard 13, the Student Success Transformation commits WCU to achieving greater student involvement in the University's academic culture, campus life, and academic and co-curricular programs.

*Standard 14: Assessment of Student Learning.* In support of Standard 14, the Student Success Transformation calls directly for the integration of assessment into all of the University's curricular and co-curricular programs and student services.


## THE DIVERSITY TRANSFORMATION

Supporting the Diversity Transformation's central commitment, "West Chester University will strengthen its commitment to pluralism, access, equity, and a supportive campus climate for a diverse community of students, staff, faculty, and administrators," are four goals:

D.1. Apply strategies of proven effectiveness for recruiting and retaining a diverse community of students, staff, faculty, and administrators.

D.2. Increase investigations of and resolve barriers to access, equity, and a campus climate supportive of diversity.

D.3. Ensure that academic curricula and institutional programs reflect the University's commitment to diversity and equity.

D.4. Ensure an institutional climate that values civility and promotes tolerance.

As expressed in its *Plan for Excellence* and campus-wide policies and practices, West Chester University is committed to attracting, enrolling, and graduating students from a wide variety of educational, cultural, and economic backgrounds. The members of the University believe that a diverse community promotes a stimulating intellectual environment, increases its members' understanding of different cultures and perspectives, and prepares students to live and work in a multicultural, global society. WCU supports and encourages programs that benefit all

people and seeks to eradicate discrimination and social injustice in society. Similarly, the University believes it is incumbent upon all members of the academic community to conduct themselves with civility toward one another at all times. Finally, the members of the WCU campus community affirm the worth and dignity of each member of the University and share the responsibility to treat each other with respect and courtesy.

## Goal D.1. – Applying Strategies for Recruiting and Retaining a Diverse Academic Community

*Recruiting and Retaining Students.* The University employs a variety of strategies to recruit minority students from the region. Admissions minority recruitment programs include the following:

- Summer Institute Enrichment Program

- Campus visitation programs for students from high schools with a high percentage of minority students, fall and spring semesters

- Pennsylvania State System of Higher Education Joint Recruitment Programs, held at different locations within the state

- PASSHE Partnership Program to recruit Philadelphia students

- High school visitations, participation in regional and national fairs, attendance at community-sponsored recruitment events

- Identification of potential applicants through the College Board Student Search Service

- *Multicultural Student Newsletter* sent to prospective students

- Phonathon to accepted students

- Online chats with accepted students

- "Get to Know Us" evening programs held in Philadelphia, fall and spring semesters

- "Check Us Out Days" held on campus, fall and spring semesters

- Multicultural WCU Student Recruitment Team

- Latino and African American student interns during the spring semester: initiate follow-up contacts with accepted students

- Listings and labels of accepted minority students forwarded to the Office of Financial Aid beginning in January for follow-up mailings

- A full-time coordinator of multicultural student recruitment on staff; an additional quarter-time assignment for one of the assistant directors of admissions

- Student recruitment publications illustrating the diverse population on campus

- The Latino American Student Organization's annual Latino Student Conference, which attracts more than 100 high-school students from the tri-state Philadelphia area

The Office of Multicultural Affairs (OMA) provides orientation and a number of mentoring programs for minority students. Some major initiatives are the following:

- OMA LINCS (Leadership, Involvement, Networking, and Career Skills), in partnership with the Twardowski Career Development Center, engages upper-level (sophomore and above) students in skill building and awareness activities—i.e., interest and career exploration, resume writing workshops, interviewing skill development, graduate school preparation and search, and job and career search.

- The Multicultural Student Achievement Transformation Project assists students in exploring their personal values, developing a greater sense of how these values influence their behavior and purpose in life, and establishing goals and objectives in the major areas of their lives (education, family, finances, personal growth, and spirituality) that are consistent with their values.

- Academic interventions support individual multicultural students on academic probation.

- See also the Student Success Transformation.

Contributing to retention are the facts that many student groups and University units offer diversity programming and that 40% of student residence hall staff are minorities. In addition, the academic departments were asked during 2004-05 to begin compiling best practices for retaining students. For academic year 2005-06, the departments are focusing on implementing these best practices and other ways to increase retention.

The University's partnership programs, particularly in Philadelphia, also contribute long term to recruiting and retaining a diverse academic community. For example, West Chester University has emerged as the leader in the Philadelphia component of the GEAR UP (Gaining Early Awareness and Readiness for Undergraduate Programs) initiative, which is designed to encourage inner-city youth to pursue higher education. As part of the initiative, WCU has coordinated a successful professional development program offered in conjunction with Cheyney, East Stroudsburg, and Kutztown universities. This program is helping GEAR UP teachers to prepare their students for higher education. In addition, WCU has organized a tutoring and mentoring program with WCU students assisting Philadelphia GEAR UP students in academic subjects. Finally, WCU has arranged for the GEAR UP young people to visit the University's campus and experience firsthand what it is like to go to college.

In another example of a program promoting the long-term academic success of Philadelphia schoolchildren, the College of Education and College of Arts and Sciences faculty have designed a grant-funded summer math camp for Philadelphia schoolchildren. With support from Dr. William Cosby, WCU Cosby Scholar teacher candidates conduct a summer camp in "noodle" mathematics for rising second graders of the Southwest Academic Region of Philadelphia. By using only their "noodle"—no pencils, calculators, or paper—the children experience the fun, relevancy, and power of mathematics for real life activities. With WCU's Cosby Scholars student teaching in these schools during the following academic year, the impact of this approach to mathematics education is reinforced.

Graduate Studies and Extended Education secured a diversity grant through PASSHE to develop and implement strategies to enhance the diversity of the graduate student body. Funds have been used for publications and a regional conference that includes other PASSHE universities and the WCU Graduate Council.

See also the 3E Institute and other partnership programs described under the Responsiveness Transformation.

*Recruiting and Retaining Faculty and Staff.* The Office of Social Equity has been working with academic departments to increase minority faculty hiring. For the entire campus, the Office of Social Equity develops and maintains an affirmative action plan for hiring, noting the job categories in which women or minorities are underrepresented. Together, the offices of Social Equity and Human Resources provide handbooks and training to search committees, and deans develop goals for hiring minority and female faculty. For both administrative and staff searches, Human Resources now works with Career Building, a Web-based network with strong diversity recruitment markets.

Social Equity staff meet with all faculty search committees. The search committees are encouraged to employ proactive strategies for recruiting minority candidates, with funding available. The Frederick Douglass Scholars Program recruits multicultural doctoral students (usually ABD) to teach a course at WCU during the summer, for which they receive a stipend and free housing. Some of these scholars have subsequently been hired for tenure-track positions. In fall 2005, the first two Frederick Douglass Scholars were recruited for one-year appointments.

Mentoring for all new faculty is provided by the New Faculty Orientation program, and since 2001, a Multicultural Faculty Retreat has taken place annually, providing mentoring and bringing issues to the attention of the administration. Currently, a University-sponsored research project is underway to examine the mentoring that minority faculty receive; the goal of the research project is to develop improved practices. Faculty and administrators regularly apply for Social Equity grants provided annually by PASSHE to fund student/faculty recruitment and retention projects. In another area, Administrative and Fiscal Affairs has initiated a program to encourage minority and women business enterprises to bid on University contracts and services.

**Goals D.2. and D.4. – Resolving Barriers to Access and Equity and Ensuring a Campus Climate Supportive of Diversity, Civility, and Tolerance**

In 2002, the SPRC Diversity Team met with a wide range of campus groups to assess the University climate and develop recommendations. In addition, in 2002-03, Simmons Associates held several focus groups and conducted a diversity survey that questioned all employees about numerous forms of diversity and discrimination.

Simmons Associates' 2003 report led to the establishment in 2003-04 of the Committee for Social Justice (with faculty, administrators, staff, and students as members), which submitted recommendations to the administration. A 2004 administrative task force worked to implement the recommendations. In 2004-05, a Student Roundtable on Racism was conducted by the Office of Social Equity. About 175 students participated in the event, which was designed to gather information, catalyze student participation, and develop an action plan for the University. Student representatives presented recommendations to the President's Council. The work of these groups resulted in a number of initiatives to remove barriers and improve the campus climate for women, minorities, and disabled persons.

Since 2001, the University has adopted the AAUP Statement on Ethics for faculty (with APSCUF approval); updated its Sexual Harassment Policy to deal with issues and ambiguities that became apparent since the previous policy had been adopted in 1994; developed a new Misconduct Policy, applicable to all University employees, to deal with unprofessional behavior that was not covered by the Sexual Harassment Policy; and instituted a Social Equity Advisory Board. In 2004-05, the Social Equity Office organized faculty facilitators to lead discussions in every academic department on sexual harassment, and a training course in preventing and addressing sexual harassment has been put on the University Web site, where the course is available to faculty, staff, and students. The Investing in Employee Excellence workshops offered by Human Resources include programs on the value of diversity (including 25 programs attended by 200 employees in 2004-05). The University has also devoted portions of the technology fee (instituted in 2002) to purchase a wide range of assistive technologies for students with disabilities. Programs such as the Frederick Douglass Institute, the Campus Climate Intervention Team, the Women's Center, and Civility Day continue to support diversity and educate the campus. Relevant permanent committees are the Americans with Disabilities Act Committee; the Sports Equity Committee; and the Lesbian, Gay, Bisexual, Transgendered Concerns Committee. A campus climate student survey is conducted on a regular basis, most recently in 2001 and 2005. Finally, the University's Values Statement, in place since 1995, provides a strong foundation for promoting an institutional climate that values civility and promotes tolerance.

The Social Equity Policies and Procedures handbook may be found in the appendices.

**Goal D.3. – Ensuring That Curricula and Programs Reflect the University's Commitment to Diversity and Equity**
WCU has a longstanding commitment to diversity in the curriculum, including the following curricula that were instituted 10-30 years ago: women's studies, Holocaust studies, African American studies, Asian American studies, Hispanic American studies, Jewish American studies, and Native American studies. More recently, a minor in African and African American literature, a BA in women's studies, and an MA in Holocaust and genocide studies have been added to the curriculum; and many individual courses have been added that address minority or diversity issues.

An important change since 2001 has been the institution of a revised general education curriculum, which includes a diversity requirement to be met by taking an approved course. This requirement has led to the creation of many new courses in both the College of Arts and Sciences and the professional colleges. (See chapter 2, Institutional Response to Recommendations: General Education.)

In addition, WCU has a highly regarded Curriculum Integration Program (cited as a "best practice" by the Middle States Self-study review team in 2001) that sponsors an annual faculty seminar in which participants explore ways to incorporate knowledge about gender, race, class, and ethnicity into their courses, as well as pedagogy for a diverse student body. The provost provides 12 faculty per year with released time to attend the Curriculum Integration Seminar, which is conducted by faculty facilitators; to date 124 faculty have attended.

The Pedagogy for Engagement Committee annually offers a series of programs related to teaching effectiveness and innovation, and some of these programs deal with diversity issues. (For additional information about the Pedagogy for Engagement Committee, see the Human Capital Transformation.) The University also promotes knowledge of cultures outside of the U.S. in its curricula, and since 2001, the provost has funded a Faculty/Staff Development Abroad Initiative that has initiated exchanges with universities in China and Poland, with plans to expand to other countries.

**Summary and Outlook**

West Chester University competes with more than 200 institutions of higher education in the region for qualified minority applicants. Nevertheless, the University's recruitment efforts have led to an increase in minority student enrollment. In fall 2004, West Chester University ranked second among the PASSHE universities in the number of first-year, degree-seeking African American and Latino students. Between fall 2004 and 2005, Latino student enrollment increased by 35 students and African American enrollment by 21 students. Although the number of minority students has increased, the percentage of minority students compared to the total student population has not increased since 2001 and remains at 15%. To ensure an increase in the percentage of minority students at WCU, the Enrollment Projections Team has articulated goals for 2005-09 that focus on increasing minority enrollment.

Improving minority graduation and retention rates continues to be both a University and a State System priority. Part of the PASSHE performance funding is based on these measures. Furthermore, each division within the University has created and implemented initiatives that advance the vision of a diverse community at WCU, and each divisional vice president reports on these initiatives in his or her annual report and annual management evaluation document. In Information Technology, the minority vendor program has been successful and could be improved upon if the State System policy of awarding contracts to the lowest bidder is revised. Of the many programs initiated, one of the most successful is the joint open forums held by the Facilities Division and AFSCME. A similar program could be initiated between management and APSCUF pertaining to issues that affect the faculty.

Many units within the University provide a wealth of co-curricular programming that supports diversity for the benefit of faculty, staff, and students: Social Equity, Human Resources, Co-Curricular Programming, Residence Life, Multicultural Affairs, Cultural and Community Affairs, Women's Center, Frederick Douglass Institute, Services for Students with Disabilities, women's studies, Holocaust and genocide studies, and ethnic studies. Many programs are also offered by student groups, including the Black Student Union; Latino American Student Organization; Asian American Organization; International Students Organization; Hillel; Black and Latino Greek Council; and the Lesbian, Gay, Bisexual, Transgender Alliance. Major University events on campus that celebrate diversity include Martin Luther King Day, Civility Day, Black History Month, and Women's History Month.

**Middle States Standards Relevant to the Diversity Transformation**

*Standard 8: Student Admissions.* WCU's Vision, Mission, and Values statements support access and diversity, and the University's admissions policies and procedures seek to recruit a diverse student body. Consistent with this goal, University publications reflect a diverse student body.

*Standard 9: Student Support Services.* Student support services are in place to support women and minority students and to educate the University community about diversity, civility, and tolerance. Policies and procedures are in place to ensure equity for all students.

*Standard 10: Faculty.* Initiatives to promote diversity in the curriculum and pedagogical innovation are led by faculty, who design, maintain, and update curricula. Professional development in relation to diversity is provided to faculty. Policies and procedures are in place to recruit and retain a diverse faculty and to ensure equitable treatment.

*Standard 11: Educational Offerings.* Curricular offerings prepare students to live and work in a multicultural society and global economy and support WCU's Vision, Mission, and Values statements. Co-curricular offerings on diversity complement curricular offerings, contributing to the total educational environment and the development of life skills.


# THE HUMAN CAPITAL TRANSFORMATION

The Human Capital Transformation states, "West Chester University will increase its investment in the continued development of the skills and knowledge of its faculty, staff, and administrators." Supporting that commitment are eight goals:

H.1.    Strengthen the teacher-scholar model that encourages faculty to bring their scholarship into their teaching and their students into their scholarship.

H.2.    Encourage and broaden discussion about the meaning of the teacher-scholar model at West Chester University, including its reflection in institutional practices and policies.

H.3.    The conceptualization of the teacher-scholar model at West Chester University should be followed by a clearer definition of the kinds of faculty development activities needed to support the model and the resources necessary for its implementation.

H.4.    Increase support for the use of alternative pedagogies and instructional technology.

H.5.    Institute professional development plans as part of faculty five-year reviews.

H.6.    Construct essential skills inventories for all staff positions on campus.

H.7.    Increase support for skill enhancement and professional development for staff and administrators.

H.8.    Provide programs engaging staff, administrators, and faculty in collaborative professional development efforts and the sharing of information and perspectives.

The *Plan for Excellence* Human Capital Transformation emphasizes the institution's intention of investing in the development of employees' professional abilities to achieve new, renewed, and otherwise changed—or *transformed*—knowledge and skills. While this endeavor

has been interpreted in the specific Human Capital Transformation goals (above) to emphasize faculty and staff professional development, the Human Capital Transformation also advances broader objectives by seeking to energize the University's workers to explore new areas of professional growth and to develop their skills and talents as deliverable assets. The Human Capital Transformation encourages University employees to explore their interests and fully actualize their strengths. The result should be greater fulfillment and job satisfaction along with enhanced creativity and quality of work and work environments.

In this broader definition of *human capital*, employees are encouraged not only to seek to learn new skills but also to become expert learners who can take away from any new experience knowledge and skills that will serve them well in current and future personal and professional life circumstances. The central goal underlying the Human Capital Transformation is developing a workforce that knows much, can do much, and thinks in flexible ways that allow effective collaboration with others in creating and enhancing quality learning and teaching.

The underlying philosophy of this transformation involves the belief that the more individuals know and develop, the more they can fully engage in and enjoy the world—and the more they, as officials of the University, can create a world that encourages students to identify and develop their own talents to meet the challenges and opportunities presented in a rapidly changing world. The Human Capital Transformation supports the president's distributed leadership model, which encourages leadership at all levels of employment at the University.

## Goals H.1.-H.5. – Faculty Roles

The teacher-scholar goals in the *Plan for Excellence* promote formalization of the definition of the faculty role at a regional comprehensive institution. The term *teacher-scholar* had previously been in use but not necessarily defined or accepted by everyone. Beginning in 2001, two University open forums were held to discuss the advantages and disadvantages of the University's development of a teacher-scholar model for faculty. During these discussions, which were facilitated by the provost and SPRC, some faculty members expressed their conviction that both faculty scholarship and teaching should be supported, as well as the involvement of students in faculty scholarship. The provost responded by encouraging faculty members to work within their departments, colleges, and disciplines to define teacher-scholar models that reflect the scholarship, teaching, and service appropriate for their area and that also identify ways that students benefit from the scholarship of West Chester University faculty.

In 2002, college-level conversations designed to define and integrate the teacher-scholar model at WCU were planned. Funding was set aside for deans' teas to which small groups of faculty members were invited to converse about the teacher-scholar model and ways that it might differ in nature and form in each college. This approach for gathering ideas was modeled after the president's successful acquisition of input from faculty in formulating the University vision. Subsequently the deans were asked to charge individual departments with the development of teacher-scholar model definitions based on disciplinary standards, practices, and methodology in relation to scholarship, teaching, and service. These teacher-scholar definitions were to provide the context for each individual faculty member's statement of expectations, required of all new faculty and revised every five years for tenured faculty in connection with post-tenure review.

In Meet and Discuss and Deans Council, the faculty union (APSCUF), the provost, and the deans reviewed the process of developing teacher-scholar definitions. In September 2005, the University president and the APSCUF president signed a revised Statement of Promotion Policies and Procedures that includes reference to teacher-scholar models. Because the teacher-scholar models provide relevant information for tenure and promotion decision-making, the University's Tenure and Promotion Committee (TeP), consisting of elected faculty members, expressed support for the use of the teacher-scholar definitions and statements of expectations and has begun using departmental teacher-scholar models to aid in their process.

At present, progress towards discussing, defining, and implementing teacher-scholar models (goal H.2.) and integrating the models in faculty scholarship and teaching (goals H.1. and H.3.) is well underway. All academic departments have developed teacher-scholar models that have been submitted to the deans and provost, and the departments have been requested to modify their statements of expectations for department members to integrate with their teacher-scholar model and mission statement. The next step will be to carry out goal H.5., the institution of professional development plans as part of faculty five-year reviews. This goal will be addressed within the next few years. At present, the development of teacher-scholar models and statements of expectations have given clearer guidance to untenured faculty and improved deliberations in TeP.

The employment of alternative pedagogies (goal H.4.) has been enhanced by the work of the Pedagogy for Engagement Committee (PEC). This committee, which reports to the provost, receives funding to support effective and innovative teaching. The Pedagogy for Engagement Committee consists of faculty representing all five colleges and administrators from Academic Affairs and Student Affairs. The committee receives a budget from the provost. The purpose of the PEC is to improve teaching and learning at WCU by enhancing curricula and pedagogical modes that actively engage students. The committee offers a two-week summer seminar series on pedagogy with follow up during the academic year, is creating a Web site to share information, and offers grants to support pedagogical or curricular innovation.

Topics covered in workshops in the past year include the development of new courses for the general education curriculum (interdisciplinary, diversity, and writing emphasis), experience with service learning courses, the use of student evaluations to improve teaching, ways of engaging students in a large class, alternative course formats, the cognitive development of college-age students, and the implementation of assessment plans and resulting action plans. Workshops are conducted primarily by WCU faculty, with an occasional guest speaker.

The PEC offers grants to support the development of a new pedagogy or curriculum by funding such expenses as materials, supplies, training, or collaboration with other faculty. The PEC parallels the University's Faculty Development Committee, which administers University-level research grants—both report to the provost and receive funding from the provost to offer the grants. In addition to its own offerings, the PEC provides an umbrella for several pre-existing programs that support faculty as teachers, such as the Curriculum Integration Seminar, service learning courses, and learning communities—three programs that were commended as "best practices" by the Middle States Self-study review team in 2001. Additional information about PEC programs and grants may be found in the appendices.

Support for instructional technology (also included in goal H.4.) has been advanced by the provision of Blackboard, laptop technology carts, Wi-Fi hotspots, and classrooms equipped with multimedia presentation packages. A specialized lab, the Digital Corner, has been established in the Academic Computing Center for the production of multimedia enhanced classroom assignments, with expert support staff to assist faculty. (See also the Student Success Transformation, goal S.1.)

The University offers a full calendar of software application training for faculty and staff, as well as a telephone help desk and opportunities for individualized training. Over the last eight years, Information Services/Academic Computing has offered the annual RECAP (Resources for the Electronic Classroom: A Faculty-Student Partnership) conference. The purpose of the two-day conference is to offer WCU and other PASSHE faculty the opportunity to improve and enhance their classroom learning environment by integrating technology into their curriculum. More than 1,000 people have participated in the conference since its inception.

Most significant for the greater availability and integration of classroom technology in the last few years has been the PASSHE-wide institution of a technology fee charged to all students beginning in 2002. WCU has used the fee to improve instructional technology—not only the multipurpose equipment mentioned above but also dedicated special purpose high-technology rooms to serve particular disciplines, such as foreign languages, the sciences, music, business, and computer science. Initially, the technology fee could be used to buy new equipment only. As of 2005, the fee can also be used for support staff. Since 2002, more than $4 million from the technology fee has been or will be deployed on campus, with the following results:

- More than 100 presentation/multimedia rooms have been installed on campus.

- More than 240 mobile PC labs on carts have been deployed on campus.

- More than 10 new labs have been deployed.

- 56 PCs for student use have been installed in the residence hall labs.

- 52 Tablet PCs and 53 Apple PowerBooks have been deployed.

- 25 Palm PCs have been deployed.

- More than 150 PCs and 62 Macintosh computers have been deployed in the labs.

- Numerous scanners, printers, cameras, and camcorders have been deployed for students.

- More than $1 million in new technology equipment will be installed in the new music building.

Support for scholarship is important for advancing the teacher-scholar model and the Human Capital Transformation itself. The Office of Sponsored Research and Faculty Development supports faculty research and a variety of faculty development opportunities. Faculty are strongly encouraged to pursue both internal and external funding opportunities. Since 2001, support for faculty seeking external grants has been increased by hiring a part-time grant writer, offering a monthly series of workshops on grant writing, supporting faculty travel to consult with funding agencies, instituting a research incentive award that rewards faculty for

submitting applications to external funding sources, and increasing publicity and recognition. External grant funding increased from $2,273,501 in fiscal year 2001 to $5,997,641 in fiscal year 2005. The Office of Sponsored Research and Faculty Development has oversight of the University Faculty Development Committee, which awards internal grants for faculty research. This committee reports to and is funded by the provost, paralleling the PEC, as mentioned above.

The Office of Sponsored Research and Faculty Development celebrates faculty scholarship through the Distinguished Sponsored Research Award and the faculty Research Recognition Reception. The office co-sponsors, with the faculty Research Consortium, an annual Research Day that showcases both faculty and student research and gives awards to students. An additional important new program in the last five years has been the Faculty/Staff Development Abroad Initiative, establishing exchanges and research collaborations between WCU and universities in China and Poland. In 2005, the Global Development Collaborative was initiated to facilitate future exchanges, collaborative research, travel to international conferences, and the integration of global perspectives in the curriculum. The Office of Sponsored Research and Faculty Development supports numerous other faculty development programs discussed in other parts of this report, such as the Curriculum Integration Seminar, New Faculty Orientation, and Frederick Douglass Teaching Scholars. Information about Office of Sponsored Research and Faculty Development programs can be found in the appendices.

**Goals H.6.-H.8. – Professional Development for Staff, Administrators, and Faculty**
Programming that promotes Human Capital Transformation goals H.6., H.7., and H.8. is provided by the Organizational Development unit in the University's Office of Human Resources. This unit was created in response to the Human Capital goals. The director of Organizational Development position was created almost three years ago by assigning the function to an existing Human Resources professional who had previous training and interest in the organizational development area. Existing clerical support also was assigned to the function. In fall 2005 the University expanded its commitment by adding another professional trainer for a two-year trial period. While prior efforts in skill enhancement and the professional development of staff and management were less organized and were accomplished primarily on a departmental basis, the new unit has organized a program that is currently growing and being refined to meet staff and faculty development needs. The Organizational Development program is supported by a Training Advisory Committee whose members represent major segments of the University. Human Resources' Organizational Development unit works collaboratively to carry out its mission by the following means:

- Cultivating the workforce and enhancing its organizational culture through professional and personal development programs

- Assisting individuals in developing or refreshing their skills (i.e., interpersonal, technical, leadership, and supervisory or managerial) to meet WCU and job-specific competencies

- Offering programming using a variety of approaches to meet employees' learning styles (for example, classroom or Web learning)

- Collaborating with other University offices to offer and/or promote opportunities to educate employees about Organizational Development services, policies, and procedures

- Working with WCU divisions, departments, teams, and other groups to address and respond to specialized training needs

- Overseeing the University's performance management systems and developing programming to respond to systemic issues

- Creating a learning environment to assist new employees in their successful orientation and integration into WCU and its community

Accomplishing goal H.6. has begun with the development of a new staff evaluation system. In 2004-05, managers were invited to attend workshops to learn a system that entails developing new job descriptions and defining skills and objectives and to learn coaching and feedback skills. The implementation of this new system will take place over a two-to-three-year period. Goals H.7. and H.8. are being met by a year-round schedule of professional development workshops offered to staff, administrators, and faculty. More than 65 courses were offered in fall 2005, for example. (The course calendar may be found at http://www.wcupa.edu/hr/training.)

Perhaps the most important professional development offering is the Leadership Development Seminar, which encourages campus leaders and potential leaders to promote meaningful change at the University. More than 150 faculty, managers, supervisors, paraprofessionals, and other campus leaders have participated in ten cohorts since 2002. The seminar creates a learning and networking environment for existing and emerging campus leaders.

The appendix "Top Human Capital Events" contains additional initiatives in progress that support the Human Capital Transformation; related appendices include Investing in Employee Excellence programs offered by the Office of Organizational Development.

**Summary and Outlook**

The Human Capital Transformation helps to institutionalize the leadership development model that the president has promoted throughout her presidency. Distributed leadership sees all members of the faculty and staff as experts in their own right—as sources of knowledge, experience, and wisdom. Under distributed leadership, everyone is responsible and accountable for leadership within his or her area. Good ideas come from throughout the University, and many people cooperate in creating change. Distributed leadership is an environment where everyone feels free to develop and share new ideas. A central goal of the approach is for individuals to succeed in a climate of shared purpose, teamwork, and respect.

In an example of distributed leadership, every year, SPRC assesses progress on each transformation in the *Plan for Excellence* and reports to the President's Cabinet. In fall 2005, SPRC made the following recommendations for the ongoing implementation of the Human Capital Transformation:

- The definition of "human capital" should be discussed at all levels (department, college/division, University, and APSCUF Meet and Discuss) in an effort to examine its broader meaning in order to create opportunities for enhanced planning and employee development.

- A systematic assessment effort, including needs assessment and outcomes measurement, for faculty and staff professional development should be implemented.

- Conversations for the purpose of incorporating teacher-scholar models into professional development plans for faculty five-year reviews (goal H.5.) and professional development funding should take place at Deans Council, in each department, and at APSCUF Meet and Discuss.

- The goal of constructing skills inventories (goal H.6.) will require substantial development over the next year. Outcome goals can include a career ladder and a broader definition of "human capital."

**Middle States Standards Relevant to the Human Capital Transformation**
*Standard 5: Administration.* Human Capital Transformation goals support the distributed leadership model, which provides administrators, faculty, and staff with the autonomy and resources to develop initiatives that carry out the *Plan for Excellence* and the mission of West Chester University. The implementation of these goals facilitates the institution's learning and research/scholarship, fosters quality improvement, and supports the institution's organization and governance. In particular, WCU administrators are given the authority to carry out their missions and are aided in their abilities to perform their responsibilities by the Leadership Development Seminar program and the staff development programs provided through the Office of Organizational Development.

*Standard 6: Integrity.* The Human Capital Transformation and its goals enable all of WCU's employees to understand, contribute to, and promote institutional excellence, academic freedom, ethical standards, and the University's stated policies and procedures.

*Standard 10: Faculty.* The Human Capital Transformation goals concerning the teacher-scholar model support the central role of faculty in teaching and learning activities, as well as their participation in research, governance, and service activities. Programs supporting the teacher-scholar model, in turn, support and prepare faculty to carry out their responsibilities, contributing to their professional development as teachers and scholars and as institutional leaders. The model serves to guide the institution's view of effective teaching as it is integrated with scholarship in individual disciplines and has prompted a broadened definition of scholarship and greater integration of faculty research with instruction, encouraging faculty to engage students in their research and to enhance their teaching through the use of their scholarship. The teacher-scholar model has been formally integrated into departmental mission statements and faculty evaluations for continued employment, tenure, and promotion.


**THE RESOURCEFULNESS TRANSFORMATION**

The Resourcefulness Transformation states, "West Chester will diversify the base of its physical and fiscal resources and increase the effectiveness with which they are managed." Supporting the Resourcefulness Transformation are six goals:

Rf.1.   Extend distributed leadership practices across all levels of the University.

Rf.2.   Implement systematic process-improvement initiatives.

Rf.3.   Eliminate excessive bureaucracy and strengthen cross-divisional collaboration.

Rf.4.   Diversify and add to the University's financial resource base.

Rf.5.   Base resource allocations on the University's mission and priorities and create a campus culture in which individual and departmental priorities support University missions and goals.

Rf.6.   Implement the Capital Facilities and Technology plans.

Nationwide since the 1970s, the states' appropriations to colleges and universities have been dropping as a percentage of the states' budgets, while the cost of providing higher education has steadily increased. For West Chester University, the proportion of the education and general budget covered by state funding has declined from 63% in 1983, when the Pennsylvania State System of Higher Education was formed, to 44% for fiscal year 1999, to about 36% currently.

At the same time, while capital funding for new buildings at PASSHE universities was until a few years ago 100%, the Commonwealth now requires a 50% university match. Unfunded federal, state, and Board of Governors mandates can also affect the University's efforts to manage costs. And collective bargaining agreements, which are effected at the state level, require each university to fulfill new contractual obligations without additional funding. Along with these changes has come increasingly low tolerance for the needed tuition increases that might offset appropriation shortfalls.

In spite of such challenges, West Chester University has positioned itself to maintain excellence through agility, foresight, and best practices. The University's approach to addressing the evolving relationship between the states and public higher education is guided by the distributed leadership model, with its balance of shared responsibility and accountability; the University's Enrollment Projections Plan; a variety of efficiency and accountability initiatives; a wide range of programs designed to meet economic and workforce development needs; and the *Plan for Excellence* transformations.

The Resourcefulness Transformation recognizes that the financial wellbeing of the institution depends upon knowledgeable employees who are empowered to make decisions, acquire resources, and provide services that will maximize productivity. The University has accepted the challenge of reviewing and modifying business practices and of embracing new technology to streamline processes, improve productivity, and make the most of available resources. The entrepreneurial efforts of administrators and faculty have led to increased efficiencies and to the development of new and innovative programs.

**Goal Rf.1. – Extending Distributed Leadership across the University**
The distributed leadership model provides core management principles that encourage an innovative culture, a culture in which every person is important in the functioning of the University. Distributed leadership practices are being extended throughout the levels of the University by modeling the practices, providing direction and support to managers, and institutionalizing distributed leadership as part of the University's organization. This management philosophy has led to the development of WCU's decentralized budgeting

environment and allocation models, which enable vice presidents, deans, and directors to make more effective use of fiscal resources.

For example, Academic Affairs budgetary responsibility has been decentralized to the academic dean/director level. Since implementation of the Academic Year Model (AYM) and Summer School Model (SSM), deans both have budgetary authority and are held accountable for the efficient allocation of faculty resources. This policy has resulted in increased credit hour production, more efficient and flexible management of class sizes, and a greater awareness of the fiscal implications of academic decisions. The following totals reflect the credit hours eligible under the AYM:

| FY95 Credit Hours | 245,551 |
|---|---|
| FY05 Credit Hours | 294,027 |
| Increase in Academic Year Credit Hours | 48,476 |

| FY95 Credits per FTE Faculty Member | 462.61 |
|---|---|
| FY05 Credits per FTE Faculty Member | 554.05 |
| Increase in Credit Hours per FTE Faculty | 91.44 |

Note: The AYM excludes credit hours generated as a result of individual study, internships, continuing education, and off-campus courses.

## Goal Rf.2. – Implementing Systematic Process-Improvement Initiatives

Goal Rf.2. is being advanced through a combination of assessment, follow-up, and innovation, as examples illustrate:

In the spring of 2003, the University engaged the services of Core Management Services to conduct a benchmarking and staffing study of WCU custodial operations in order to identify operational changes to improve productivity. The information collected from the study was used to provide three full days of custodial training for the entire custodial staff and to make such changes as moving many functions to the night shift and eliminating 11 custodial positions.

A Sightlines study, which quantitatively defines the economy's effect and long-term capital impact on facilities through the application of the Return on Physical Assets Model, has been completed for facilities operations. This model monitors and measures four key aspects of facilities management:

1. Annual stewardship, which gauges the amount and effectiveness of repair projects

2. Asset reinvestment, which looks at new construction

3. Operating effectiveness, which looks at maintenance spending and the cost of service

4. Service, which surveys customer satisfaction

Examples of enhanced customer service for current and prospective students include these:

- Electronic applications for both undergraduate and graduate students

- Online financial aid applications and access to information about individual financial aid packages

- Online course drop/add as well as online access to most student records

- The Virtual Advisor, an online site for prospective students that provides answers to frequently asked questions (FAQs) and other resources

- The Ask the Ram Web site, which is geared toward current students and faculty and includes FAQs and resources related to academic scheduling and advising

- A comprehensive database of prospects, applications, admissions, and yield rates by program to track and provide better service for graduate students

- Bursar and Fiscal Affairs presentations during orientation sessions to disseminate information to new students about billing and office services

- An Office of the Bursar survey of more than 2,000 students to obtain feedback on the University's tuition partial payment plan

- The addition to billing forms of direct contact phone numbers for account representatives, making it easier for students to ask questions and resolve issues

The University's Public Safety Department has implemented several initiatives to improve service to the campus community. In addition, Public Safety officers and dispatchers receive regular training in customer service. Similarly, the Facilities Division has taken action to enhance customer service; examples include the following:

- In order to provide "one-stop shopping" for students, the Campus Five-Year Relocation Plan moves most of the student support offices (including the offices of the Bursar, Financial Aid, and Registrar) from the E.O. Bull Center, on the southeast edge of North Campus, to a renovated Swope Hall, located in the center of North Campus.

- Over the past two years, Facilities Division has reorganized, allowing centralized control of work processing and increased internal communication to improve service.

- A new work order system allows the online processing of work requests and automatic mailing of e-mail responses and status updates to the work originator.

- Over the past two years the division has solicited feedback from campus constituencies through customer satisfaction surveys on completed work orders.

- The University's legacy room-scheduling system has been replaced by R25 event-scheduling software, which includes an interactive online calendar and allows users to request space in any campus building. The classroom scheduling component has also been fully implemented.

**Goal Rf.3. – Eliminating Excessive Bureaucracy and Strengthening Collaboration**
In order to eliminate excessive bureaucracy and strengthen cross-divisional collaboration, the University has taken a three-pronged approach. First, as part of their assessment efforts, service departments seek customer feedback. Second, areas providing services are being reorganized to be more customer centered. Third, departments and divisions are encouraged to look for bureaucratic roadblocks and develop solutions for overcoming them.

The Advancement Fellow and Advancement Associate initiatives provide a clear example of programs that directly support goal Rf.3. The Advancement Fellow Initiative is designed to provide current faculty and administrators with the opportunity to gain experience by observing all aspects of the Advancement Division, with a particular focus on fundraising and communications. Advancement fellows participate in advancement and public relations projects that benefit their home college or department. Since the fiscal year 2001-02 inception of the program, six faculty from Academic Affairs have participated. Although advancement fellows do not directly raise funds, some fellows go on to become advancement associates. Advancement associates dedicate 50% of their time to the program and, in collaboration with their dean and the Advancement Division staff, work to secure gifts in support of their colleges' priorities. In fiscal year 2004-05, these gifts amounted to more than $550,000. Also in 2004-05, the Student Affairs Division joined the project.

**Goal Rf.4. – Diversifying and Adding to the University's Financial Resource Base**
The key elements of goal Rf.4 include the following:

1.  Increasing external funding, including a capital campaign and expanded planned giving efforts as a tool for building endowment

2.  Increasing gift and grant income, including strengthening services offered by the Office of Sponsored Research

3.  Expanding innovation and entrepreneurship, including creating the Fund for West Chester University

4.  Promoting an institutional image that emphasizes excellence and creating and implementing a marketing plan

First, the University's current capital campaign, the Campaign for Excellence, was initiated in 2001 with a goal of $25 million to increase the University's endowment and provide funding for University construction projects such as the new Swope Music Building and the Performing Arts Center. By spring 2006, the campaign had achieved 90 percent of its goal. (See the appendices for donations by project and donor category.)

Second, grant and foundation support continues to increase. For fiscal year 2004-05, WCU received notice of 118 new awards, totaling $5,997,641, from external funding agencies. These awards represent 28% more funded proposals than for fiscal year 2003-04. (See the appendices for grant award highlights.)

Third, in order to advance the University's ability to attract private resources and undertake certain construction and contractual activities, the president authorized the incorporation of the Fund for West Chester University. This nonprofit [501 (c) (3)] organization is responsible for fundraising, the development and operation of student housing, the construction of other facilities as requested by the University, endowment management, and any other contractual activities that will benefit WCU. In essence, the Fund has become the University's entrepreneurial arm. Since its inception, the Fund has built a $42 million student housing project, raised record gift dollars (WCU has jumped from seventh to first in fundraising among PASSHE universities), undertaken lobbying activities on behalf of the University, managed $11 million in endowment resources, and begun development of an undergraduate

business center. The Fund has also provided an alternative vehicle for research grants and activities.

The University's entrepreneurial spirit and innovation are also reflected in the Graduate Business Center, which was developed without state funds. The Graduate Business Center offers academic programs that last year generated more than $1 million, with corporate programs and rental income bringing in an additional $300,000.

An additional example of entrepreneurship and innovation is West Chester University's hosting of the Amazon Center for Environmental Education and Research Foundation (ACEER), whose headquarters are located on campus and whose president is the chair of WCU's Department of Health. ACEER's University Outreach Program coordinates internships and faculty and student research in the Peruvian rainforest. For the past 11 years, the University and ACEER have jointly offered WCU academic courses and continuing education workshops in Peru. Among its other projects, ACEER and its partners—including WCU and the National Geographic Society—are completing two new canopy walkways in the Peruvian Amazon.

Finally, a new marketing team and approach have been developed. The team is in the process of further refining their role and fully integrating the new marketing approach into all areas of the campus.

## Goal Rf.5. – Basing Resource Allocations on the University's Mission and Priorities

In the face of limited resources, goal Rf.5. has been given the highest priority. In supporting the goal, the University's Administrative Budget Committee (ABC) has established policies and procedures under which requests are framed and allocations are awarded based on University priorities as articulated in the *Plan for Excellence*. Similarly, all divisional performance plans and goals are to be aligned with the *Plan for Excellence*.

An increase in PASSHE performance funding has generated additional resources and helped to balance state appropriation shortfalls. Also, a revised PASSHE funding formula was adopted in 2004-05 with a three-year phase-in of the new allocation, which provides $4.8 million in new funding to the University over the three-year period. Using the new funds, ABC solicited requests from across the campus for University-wide funding needs and new initiatives in support of the *Plan for Excellence.* Of 44 requests received, 18 were funded for a total of $2.1 million in permanent and one-time funding. (See the appendices for a list of approved proposals.)

The Strategic Planning Resource Council currently allocates annual Presidential Initiative awards totaling $50,000-75,000 for campus projects advancing the *Plan for Excellence* strategic transformations. Grant recipients are expected to identify, compile, and share best practices and lessons learned from implementation of their project. (See the appendices for a list of funded proposals.)

## Goal Rf.6. – Implementing the Capital Facilities and Technology Plans

The key elements for implementation of the University's Capital Facilities and Technology plans have been, first, breaking the plans into phases and allocating funds so that

progress can be made and, second, summarizing and publicizing both plans so that the campus gains an understanding and is supportive of the plans.

Since 2001, the University has made significant progress in implementing both plans. For example, in partnership with the Borough of West Chester, the University has completed two parking structures that were built on University property and are maintained and managed by the borough. And currently under construction is an expansion to Lawrence Dining Center, which, when opened in 2006, will accommodate 250 additional diners per seating and will feature a 1950s-vintage diner and an Einstein Bagel franchise to offer before- and after-hours service to the student population.

A private-sector partnership has provided new student housing in spite of the fact that the Commonwealth of Pennsylvania no longer allocates resources for student housing. To address WCU's housing shortage, the Fund for West Chester University, working with College Park Campus Partners, Inc., designed and built 788 beds of new housing at a cost of $42 million. The Fund for WCU has chosen College Park to operate the housing on its behalf. In addition to reducing the cost and increasing the speed with which housing could be provided, the project allowed the University to meet the growing housing demand from entering students. In fact, because of this project, WCU was able for the first time to offer housing to transfer students. The housing also has contributed to improved community relations. WCU was the first PASSHE university to build privatized housing on state property. In spite of this success, the University continues to need to address the fact that most of the other University-owned housing stock is 40 years old and in need of major renovations.

A centerpiece of the Comprehensive Facilities Plan, the new Swope Music Building and the Performing Arts Center, is scheduled for completion in 2006, with anticipated occupancy for spring semester 2007. For the first time, the University requested and received delegated authority from the Pennsylvania Department of General Services to perform the construction management services for this project. The advantages of greater control over the construction process have more than offset any disadvantages in the arrangement. The result will be a facility that will surpass in complexity and sophistication anything that the University has previously constructed, and the University will have a state-of-the-art facility that fully meets student and faculty needs.

The student technology fee, implemented by the PASSHE Board of Governors in 2002, provides dedicated funding for student/classroom related technology upgrades. This fee directly advances the *Plan for Excellence* by supporting the creation of additional technology-enhanced and wireless-laptop classrooms and expanding information access through Library Services. For additional information about the impact of the student technology fee, see the Human Capital Transformation.

By August 2003, LAN connections had been installed in all the residence halls, and all campus computing desktops—whether for student or for faculty and staff use—are upgraded every four or five years, as needed.

Over the past five years, PeopleSoft implementation for Finance and Advancement has been a successful undertaking for the University. Both systems have provided managers with reporting tools and functions not available with older generation software systems. After a successful upgrade of the Finance module in the spring of 2005, the University is continuing with implementation of the campus management modules, including the Admissions, Registrar, Financial Aid, and Student Financial functions.

In continuing the momentum in the technology area of goal Rf.6., some challenges remain. One such challenge is the dual implementation of PeopleSoft and the PASSHE-mandated SAP functions, which represents a drain on time, resources, and human capital. Implementing the SAP functions has been a step backwards for some processes or has resulted in a loss of functionality and local control.

A second significant challenge is budgetary. As instructional technology is introduced each year, the University needs to divert increasing institutional resources from non-technology activities to the maintenance, support, and eventual replacement of the acquired technology. WCU expects that each $1 million investment in new instructional equipment and software from the student technology fee will have to be matched by an annual $250,000 investment in operational support from the regular WCU budget. The University will need to look at the technology fee and technology funding in a comprehensive framework, including support and training.

West Chester University Library Services belongs to a number of consortia through which it can purchase library materials, including electronic resources and library technology, at significant discounts. Perhaps the most important of these consortia is the Keystone Library Network (KLN), which includes the 14 PASSHE universities, the State Library of Pennsylvania, Geneva College, and Thaddeus Stevens College of Technology. Examples of KLN innovative technological cooperation include U-Borrow, ContentDM, and the OpenURL resolver. U-Borrow operates through the Voyager online library catalog and permits PASSHE students, faculty, and staff to search the catalog of any, all, or any combination of PASSHE libraries and request materials directly from those libraries. U-Borrow also allows all members of the WCU community to walk into any other PASSHE library and use their university ID to borrow materials. ContentDM provides the ability for West Chester University to turn its special collections into fully searchable online resources available within the Voyager catalog and from any Web browser. The OpenURL resolver allows the West Chester University community to move directly between a citation in one database licensed by WCU to the full-text of that citation in another database licensed by the University. In 2004, West Chester University purchased about $1.7 million in electronic databases, library system software, hardware, and associated personnel through the KLN.

West Chester University is a member of Pennsylvania Academic Library Consortium, Inc. (PALCI), a self-supporting partnership of more than 50 academic libraries in Pennsylvania, New Jersey, and West Virginia. PALCI includes all the major academic libraries in Pennsylvania. Through PALCI's EZ-Borrow, students, faculty, and staff are able to search an online catalog including records for more than 15 million books owned by the member libraries, request books directly, and have the books delivered to the WCU Library in four or five days.

PALCI also provides WCU with discounts of 10-15% on electronic databases not available from other consortia.

PALINET membership provides WCU with access to Online Computer Library Center (OCLC) resources, allowing the University to make use of the OCLC bibliographic database of more than 58 million records from more than 9,000 institutions worldwide. This membership also provides discounts on such OCLC products as the ILLiad interlibrary loan system and the Docutek E-Reserves system and discounts of 10-15% on electronic databases such a Lexis-Nexis Academic Universe.

**Summary and Outlook**
Management principles and processes have contributed greatly to the successful implementation of the *Plan for Excellence* Resourcefulness Transformation. Progress has been made in disseminating the concept of distributed leadership and in providing training in leadership development. As more employees participate in the Leadership Development Seminar, distributed leadership should continue to expand throughout all layers of the University.

Complementary management approaches have found success on a sometimes smaller but still significant scale. Benchmarking, for example, has proven successful in evaluating and improving Custodial Services, and a new benchmarking project is in the planning stage for the Grounds operation. Benchmarking is a resource-intensive activity, WCU's ongoing practice of which speaks to a commitment to systematic process improvement.

In the development of resources, the success of the Fund for West Chester University and the results of that success have gone a long way toward making the University agile in support of the Resourcefulness Transformation. WCU has also been notably successful in obtaining grant funding, a trend that will need to continue to help offset permanently reduced appropriations.

Finally, continuation of the Academic Budget Committee's process for the University-wide funding of needs and initiatives will ensure ongoing alignment of the budget with the University's mission, values, and strategic plan.

**Middle States Standards Relevant to the Resourcefulness Transformation**
*Standard 2: Planning, Resource Allocation, and Institutional Renewal*; *Standard 3: Institutional Resources.* The Resourcefulness Transformation underscores the University's commitment to base all significant planning, resource allocation, activities, and change on the five *Plan for Excellence* transformations and their supporting goals.

*Standard 7: Institutional Assessment*. By clearly articulating the University's vision and priorities, the *Plan for Excellence*, including the Resourcefulness Transformation, is a clear point of reference against which to measure institutional progress and success.

***A PLAN FOR EXCELLENCE* PROGRESS REPORT**

West Chester University's 2001 self-study noted that an important way to judge the effectiveness of the *Plan for Excellence* will be the extent to which the vision that it poses is fulfilled: "The answer in ten years should be that West Chester University is the preeminent regional comprehensive university in the mid-Atlantic region because of the premium it places on serving its students and promoting their success long after their graduation." The self-study goes on to list nine criteria that indicate fulfillment of that vision. **As noted here, these criteria are in many cases already substantially met after only five years:**

***Plan for Excellence* Criterion 1**
The University's continued position as a "moderately selective" regional comprehensive university with combined SAT scores in the 1,050 or higher range for its incoming freshmen

*Current Status.* The average SAT score for entering first-year students is now 1,067, classifying WCU as a "selective" institution.

***Plan for Excellence* Criterion 2**
Sufficient diversity to ensure educational and social experiences that prepare students to live and work in a multicultural, increasingly global world

*Current Status.* See the Diversity Transformation discussion, above.

***Plan for Excellence* Criterion 3**
Continuance of the teacher-scholar model with adequate support for a strong faculty suited by interests and qualifications to work in a university committed to student success

*Current Status.* Achievement of this criterion is documented in part by the written teacher-scholar models developed by each academic department to reflect the unique attributes of successful faculty members within that discipline.

***Plan for Excellence* Criterion 4**
Seamless integration of technology across administrative and teaching enterprises

*Current Status.* See the Human Capital and Resourcefulness transformation discussions, above.

***Plan for Excellence* Criterion 5**
Enrollment plans limiting growth to the University's capacity to serve its students well

*Current Status.* The University's new Enrollment Projections Committee has developed enrollment projections through 2009, identified regional economic and labor needs, aligned enrollment projections and regional economic needs, integrated enrollment projections with academic programming, and integrated the existing Marketing and Retention committees with the new Enrollment Projections Committee to enhance customer service.

***Plan for Excellence* Criterion 6**

Completion of at least three new academic facilities to advance the University's aim of responding with excellence to the educational and cultural needs of its service region—the recently approved School of Music and Performing Arts Center and the Business and Information Technology Center, plus an Applied and Integrated Health Sciences Center as an addition to the existing three-building Schmucker-Boucher science complex

*Current Status.* The new Swope Music Building and the Performing Arts center will be completed during 2006. The Undergraduate Business Center and the Mathematics and Information Technology Center projects are in the early planning stages.

***Plan for Excellence* Criterion 7**

The addition of 750 beds to the campus's existing residence housing stock

*Current Status.* The University's newest residence halls, University Hall and the Village, opened in fall 2004 and provide space for 788 additional undergraduates.

***Plan for Excellence* Criterion 8**

Parking structures to accommodate an additional 1,000 cars

*Current Status.* The new Sharpless and Matlack parking structures include space for 849 cars.

***Plan for Excellence* Criterion 9**

A judicious balance of traditional undergraduate, nontraditional, graduate, and professional-growth and certificate-seeking students

*Current Status.* See the Responsiveness Transformation discussion and chapter 4, Enrollment Management, Enrollment Projections, and Budgeting.

# Chapter 4
# Enrollment Management, Enrollment Projections, and Budgeting


**ENROLLMENT MANAGEMENT**

In spring 2004, West Chester University reorganized its enrollment management structure in order to institute an integrated process. The pre-existing Retention and Marketing committees were reconstituted with members representing student services, the Graduate Office, Institutional Research, and faculty, and a new Enrollment Projections Committee was created to elucidate the market and economic forces affecting enrollment and program choice popularity. Representatives from these three committees serve on the Enrollment Management Steering Committee (EMC), which is co-chaired by the provost and the vice president for advancement. The provost supervises all of the enrollment service areas, and the vice president for advancement oversees marketing and public relations. The involvement of two executive cabinet positions reflects the commitment of the executive leadership to develop and implement a salient enrollment management plan. The organizational chart for the enrollment management structure is included in the appendices.

The EMC is charged with improving the integration and coordination of activities that affect the recruitment and retention of students. In addition, the EMC has attempted to strengthen the link between policy making and implementation for the recruitment and retention initiatives of the three existing enrollment management groups (enrollment projections, marketing, and retention/graduation and customer service). The EMC is also tasked with establishing enrollment management policies, priorities, and plans; recommending enrollment/retention targets to the president; coordinating enrollment and retention activities; and evaluating enrollment management outcomes. In turn, the enrollment and retention targets approved by the president feed into the budget planning process and are used to develop budget projections for the next five years.

The responsibilities of each committee are threefold. First, each committee is charged with developing a strategic plan congruent with the strategies and initiatives of the other enrollment management committees. At present, the Marketing Plan and the Enrollment Projections Plan are complete and are shown in the appendices. Importantly, each committee is responsible for the integration of the three strategic plans into a comprehensive enrollment management plan. Second, each committee is to oversee implementation of the plans and resolve obstacles preventing their realization. Third, each committee is expected to provide support and assistance to the other two enrollment management committees. The goal is for the enrollment management structure to be an integrated entity working to improve campus enrollment services, marketing, projections, budgeting, and planning.

**ENROLLMENT PROJECTIONS**

Faculty and staff from ten different departments representing all five divisions serve on the Enrollment Projections Committee, including the enrollment service directors, the assistant vice president for student affairs/residential life, the budget director, the dean of Graduate Studies and Extended Education, and the Career Center director. The Enrollment Projections Committee is chaired by the director of Institutional Research.

The Enrollment Projections Committee synchronizes enrollment projection initiatives with the Marketing and Retention committees. In turn, both the Marketing and the Retention committee use the enrollment projections as the basis of their five-year strategic plans. In sum, the Enrollment Projections Committee initiatives dovetail with the Marketing Committee and Retention Committee objectives of helping campus constituencies meet the enrollment projections of the next academic year or cycle.

The Enrollment Projections Committee was asked to create projections based on three different scenarios. The scenarios were carefully crafted by the President's Cabinet based on *A Plan for Excellence*, PASSHE's *Leading the Way*, future campus projects, municipal constraints, and funding issues. A summary of the three scenarios is provided below.

- Scenario One: Increase minority enrollment at both the undergraduate and the graduate level by 15% by the 2009-10 academic year.

- Scenario Two: Increase minority enrollment at both the undergraduate and the graduate level by 15% by the 2009-10 academic year. Also, focus growth at the graduate level to achieve 15% growth by the 2009-10 academic year.

- Scenario Three: Increase minority enrollment at both the undergraduate and the graduate level by 15% by the 2009-10 academic year. Change the mix of new students to increase the percentage of transfers (from 33% to 41%) and decrease the percentage of first-year students (from 66% to 59%).

The enrollment projections for each scenario commenced with the construction of a trend line based on five years of historical data employing the most appropriate regression model (linear, curvilinear, logarithmic, or moving average). This calculation was accomplished for the several student subgroups supposed in the scenarios. The Enrollment Projections Committee then examined the trend line for each of these subgroups to determine the practicality and sustainability of the projections for the next five years. The enrollment trend or projection was adjusted accordingly. Also considered were the regional economy and workforce estimates, U.S. Census and Pennsylvania Data Center estimates, several University budget assumptions, revenue and expenditure predictions, current staffing, and customer service issues. After sharing these resultant enrollment projections, a historical enrollment analysis, and a market and workforce scan summary with the President's Cabinet, both the Enrollment Projections Committee and the President's Cabinet agreed on Scenario Two.

The final enrollment projections consist of a five-year projection period, 2005-09, and comprise enrollment projections disaggregated by level, ethnic group, and several student types. These student types include new degree-seeking first-year students, new transfers, new degree-

seeking graduate students, overall undergraduate enrollment, and graduate enrollment. Both head count and generated credits were included in the enrollment projections. These enrollment projections for the overall enrollment and minority subgroups are shown in the table at the end of this chapter.

Based on the enrollment projections, an Enrollment Projections Plan was developed in spring 2005. This plan consists of several initiatives for each of the objectives outlined by Scenario Two. (The Enrollment Projections Plan is found in the appendices.) The Enrollment Projections Plan has been circulated widely to the campus community. Both the Deans Council and the Council of Chairpersons have had an opportunity to comment on the plan. The document was also shared with the President's Council, with SPRC, and with the department supervisors in the Department of Undergraduate Studies. Individual consultations among the Enrollment Management Committee, Retention Committee, Marketing Committee, and various departments responsible for implementation of the initiatives have been ongoing. The Enrollment Projections Plan is very specific in its logistical implementation. As a result, several working groups were assembled within weeks of its adoption.

As part of the Enrollment Projections Plan, the enrollment projections were compared with census enrollment in fall 2005. In fact, the two undergraduate enrollment projections goals were realized for fall 2005. On the other hand, the three graduate enrollment projections goals were not met in fall 2005. As a result, student and faculty focus groups were conducted in fall 2005 to ascertain factors affecting the decrease in graduate enrollment.

## RETENTION AND MARKETING COMMITTEES

Central to enrollment management at West Chester University is the consideration of the student's entire academic career. As such, the Retention Committee plays an integral part in devising strategies and initiatives to improve the retention and graduation rates at the University. Due to these efforts and the outreach to several departments, West Chester University continues to have one of the best retention and graduation rates in PASSHE. In fact, in 2004 WCU had the highest one-year retention rate (84%) of all State System schools. Both the Retention Committee and the Enrollment Projections Committee have continued to work steadily to advance the initiatives recommended by both committees. One such effort is the inclusion of specific action plans within the Enrollment Projections Plan that address second-to-third-year retention, especially for minority and Academic Development Program (ADP) students. The Retention Committee and the Enrollment Projections Committee are currently involved in developing new key services and reviewing current registration practices to help improve second- and third-year retention rates.

Similarly, the Marketing Committee has revised the 2001 Marketing Plan to reflect enrollment projections and Retention Committee priorities. As with the Retention Committee's work, the Marketing Plan incorporates marketing and recruiting strategies that will help realize the enrollment projections. For example, the Marketing Plan includes a competitive analysis that will be used to align marketing with external factors. The competitive analysis will also direct which strategies will be implemented to bring the Enrollment Projections Plan to fruition. As

another example, a multicultural taskforce is working on new recruitment programs, again specifically for minority students. Unlike past multicultural work groups, this group incorporates staff from Admissions, Multi-Cultural Affairs, Marketing, Institutional Research, and the Graduate Office. Another focus is the success of students throughout their tenure at the University.

# Enrollment Projections for Fall 2005-2009

## Projected Overall Enrollment/FTE:

| Fall Cohort | | Historical | | | | | Projected | | | | | 5-Year Change |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | |
| UNDERGRADUATE | Head Count | 10,326 | 10,220 | 10,467 | 10,564 | 10,645 | 10,655 | 10,688 | 10,722 | 10,757 | 10,792 | 1.4% |
| | FTE | 9,390 | 9,341 | 9,545 | 9,644 | 9,715 | 9,716 | 9,746 | 9,777 | 9,809 | 9,841 | 1.3% |
| GRADUATE | Head Count | 1,948 | 2,204 | 2,117 | 2,133 | 2,178 | 2,240 | 2,303 | 2,368 | 2,435 | 2,504 | 15.0% |
| | FTE | 820 | 872 | 882 | 999 | 1,027 | 1,054 | 1,084 | 1,115 | 1,147 | 1,179 | 14.8% |
| TOTAL | Head Count | 12,274 | 12,244 | 12,584 | 12,697 | 12,823 | 12,895 | 12,991 | 13,090 | 13,192 | 13,296 | 3.7% |
| | FTE | 10,210 | 10,213 | 10,427 | 10,643 | 10,743 | 10,770 | 10,830 | 10,892 | 10,955 | 11,020 | 2.6% |

## Projected Minority Enrollment/FTE:

| Fall Cohort | | Historical | | | | | Projected | | | | | 5-Year Change |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | |
| UNDERGRADUATE | Head Count | 901 | 1,029 | 1,030 | 1,113 | 1,131 | 1,163 | 1,196 | 1,230 | 1,265 | 1,300 | 15.0% |
| | FTE | 802 | 919 | 920 | 994 | 1,011 | 1,030 | 1,050 | 1,070 | 1,091 | 1,111 | 10.0% |
| GRADUATE | Head Count | 103 | 113 | 116 | 134 | 155 | 159 | 164 | 169 | 173 | 178 | 15.0% |
| | FTE | 48 | 53 | 54 | 62 | 72 | 73 | 75 | 77 | 80 | 83 | 15.0% |
| TOTAL | Head Count | 1,004 | 1,142 | 1,146 | 1,247 | 1,286 | 1,322 | 1,360 | 1,398 | 1,438 | 1,479 | 15.0% |
| | FTE | 850 | 971 | 974 | 1,056 | 1,083 | 1,103 | 1,125 | 1,147 | 1,170 | 1,195 | 10.3% |

## Total Enrollment

| | Fall Cohort | Historical | | | | | Projected | | | | | Difference (2009-2004) | | | Average Credits Enrolled | | | | | Diversity Mix | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | Count | Percent | Percent Per Year | Fall 2000 | Fall 2001 | Fall 2002 | Fall 2003 | Fall 2004 | 2004 | 2009 |
| UNDERGRADUATE | African-American | 815 | 834 | 818 | 883 | 879 | 896 | 913 | 931 | 948 | 967 | 88 | 10.0% | 1.7% | 13.23 | 13.34 | 13.30 | 13.54 | 13.51 | 8.3% | 9.0% |
| | Latino | 86 | 195 | 212 | 230 | 252 | 257 | 262 | 267 | 272 | 277 | 25 | 10.0% | 1.7% | 13.50 | 14.07 | 14.06 | 13.78 | 13.93 | 2.4% | 2.6% |
| | TOTAL Minority | 901 | 1,029 | 1,030 | 1,113 | 1,131 | 1,153 | 1,175 | 1,197 | 1,220 | 1,244 | 113 | 10.0% | 1.7% | 13.28 | 13.48 | 13.46 | 13.59 | 13.60 | 10.6% | 11.6% |
| | Other | 318 | 235 | 245 | 287 | 282 | 277 | 277 | 277 | 277 | 277 | -5 | -1.8% | -0.3% | 12.95 | 13.27 | 12.73 | 13.30 | 4.33 | 2.6% | 2.6% |
| | Caucasian | 9,107 | 8,956 | 9,192 | 9,164 | 9,232 | 9,215 | 9,215 | 9,215 | 9,215 | 9,215 | -17 | -0.2% | 0.0% | 13.69 | 13.75 | 13.73 | 13.72 | 13.72 | 86.7% | 85.8% |
| | Total | 10,326 | 10,220 | 10,467 | 10,564 | 10,645 | 10,645 | 10,667 | 10,689 | 10,712 | 10,736 | 91 | 0.9% | 0.1% | 13.64 | 13.71 | 13.68 | 13.69 | 13.69 | | |
| GRADUATE | African-American | 86 | 95 | 93 | 107 | 136 | 138 | 141 | 145 | 150 | 156 | 20 | 15.0% | 2.5% | 5.28 | 5.66 | 5.54 | 6.58 | 5.85 | 6.2% | 6.2% |
| | Latino | 17 | 18 | 23 | 27 | 19 | 19 | 20 | 20 | 21 | 22 | 3 | 15.0% | 2.5% | 5.25 | 5.63 | 5.50 | 6.22 | 5.42 | 0.9% | 0.9% |
| | TOTAL Minority | 103 | 113 | 116 | 134 | 155 | 157 | 161 | 166 | 171 | 178 | 23 | 15.0% | 2.5% | 5.28 | 5.66 | 5.53 | 6.51 | 5.80 | 7.1% | 7.1% |
| | Other | 83 | 83 | 95 | 76 | 88 | 89 | 91 | 94 | 97 | 101 | 13 | 15.0% | 2.5% | 4.96 | 6.32 | 4.49 | 6.20 | 6.51 | 4.0% | 4.0% |
| | Caucasian | 1,762 | 1,828 | 1,906 | 1,923 | 1,935 | 1,964 | 2,011 | 2,069 | 2,140 | 2,225 | 290 | 15.0% | 2.5% | 5.04 | 5.90 | 4.99 | 5.53 | 5.62 | 88.8% | 88.8% |
| | Total | 1,948 | 2,024 | 2,117 | 2,133 | 2,178 | 2,211 | 2,264 | 2,329 | 2,409 | 2,505 | 327 | 15.0% | 2.5% | 5.05 | 5.17 | 5.00 | 5.62 | 5.66 | | |
| TOTAL | African-American | 901 | 929 | 911 | 990 | 1,015 | 1,034 | 1,054 | 1,076 | 1,099 | 1,123 | 108 | 10.7% | 1.8% | 12.49 | 12.61 | 12.54 | 12.79 | 12.49 | 7.9% | 8.5% |
| | Latino | 103 | 213 | 235 | 257 | 271 | 276 | 282 | 287 | 293 | 299 | 28 | 10.3% | 1.7% | 12.84 | 13.42 | 13.33 | 12.98 | 13.33 | 2.1% | 2.3% |
| | TOTAL Minority | 1,004 | 1,142 | 1,146 | 1,247 | 1,286 | 1,310 | 1,336 | 1,363 | 1,392 | 1,422 | 136 | 10.6% | 1.8% | 12.56 | 12.76 | 12.70 | 12.83 | 12.67 | 10.0% | 10.7% |
| | Other | 401 | 318 | 340 | 363 | 370 | 366 | 368 | 371 | 374 | 378 | 8 | 2.2% | 0.4% | 11.44 | 11.37 | 11.07 | 11.81 | 11.48 | 2.9% | 2.9% |
| | Caucasian | 10,869 | 10,784 | 11,098 | 11,087 | 11,167 | 11,179 | 11,226 | 11,284 | 11,355 | 11,440 | 273 | 2.4% | 0.4% | 12.30 | 12.29 | 12.52 | 12.30 | 12.31 | 87.1% | 86.4% |
| | Total | 12,274 | 12,244 | 12,584 | 12,697 | 12,823 | 12,855 | 12,931 | 13,019 | 13,121 | 13,241 | 418 | 3.3% | 0.5% | 12.30 | 12.30 | 12.18 | 12.32 | 12.32 | | |

## HISTORICAL FISCAL INFORMATION

### Overview

West Chester University is financially sound, as evidenced by its audited financial statements. The University concluded each of the last five fiscal years (2000-01 through 2004-05) with increases in net assets. These results have occurred largely because the University budgets conservatively, while still leveraging financial resources to meet critical needs. Between 2000-01 and 2004-05, total revenues increased by approximately 27%, primarily as a result of four factors: increases in enrollment, increases in rates for tuition and fees and for housing and food service, changes in the funding allocation formula (discussed below), and performance funding (also discussed below). Over the same period, operating expenses increased by approximately 17%.

### Revenues

Several key issues related to the University's finances are largely beyond its control. These issues include the operating appropriation from the Commonwealth of Pennsylvania, which has been steadily eroding as a percentage of the total University budget. The Commonwealth provides an annual appropriation to the Pennsylvania State System of Higher Education, of which West Chester University is a member university. Despite increasing costs for West Chester University and other universities within PASSHE, the Commonwealth's appropriation has not kept pace. In some years, the appropriation from the Commonwealth to PASSHE has actually represented a decrease from the previous year.

PASSHE distributes its Commonwealth appropriation to each university based on an allocation formula. PASSHE's Board of Governors approved a major modification to that allocation formula, which included a phasing-in of the new formula over a three-year period (fiscal years 2003-04 through 2005-06). The modification to the allocation formula significantly benefited West Chester University by more heavily weighting enrollment levels. (In terms of enrollment, West Chester University is the second largest institution in PASSHE.) For WCU, the change in the formula partially mitigated the funding reduction from the Commonwealth that occurred in fiscal year 2003-04.

West Chester University also receives an allocation of Commonwealth funding that PASSHE sets aside for performance. The performance funding plan is part of PASSHE's continuing commitment to ensuring the high quality of university programs. Performance funding rewards universities for success on measures such as productivity, diversity, and student advancement. West Chester University has steadily been improving on performance funding indicators and received $2,146,879 in fiscal year 2004-05.

Increases in tuition rates have often been used by public institutions to offset reductions or minimal increases in state funding. To a limited extent, PASSHE's Board of Governors took this path in recent years. Between fiscal years 2000-01 and 2004-05, tuition rates for the academic year (undergraduate, in-state students) increased 26.8%. During this same period, the Board of Governors also instituted a technology fee of $100 per year (in-state rate). Tuition revenue for West Chester University has steadily increased because of these rate increases and because of steady, although modest, enrollment growth.

Fees and charges for housing and food service are set locally by West Chester University's Council of Trustees. While Council of Trustees members have been mindful of escalating costs to students, they have also recognized the need to fund certain improvements, such as LAN and sprinkler systems in the residence halls and expansion of the dining hall. Between fiscal years 2000-01 and 2004-05, room rates (North Campus) increased 28.1%, food service rates (14-meal plan) increased 17.1%, and mandatory fees (undergraduate students) increased 30.8%.

The decrease in net revenues for auxiliary enterprises in fiscal year 2004-05 reflects the scaled-back use of one of the University's older residence halls and the housing of approximately 790 students in residence halls developed and operated through the Fund for West Chester University.

**Expenses**

Some aspects of the University's operating expenses are also beyond its control. There are six collective bargaining units at the University, and contracts for all six are negotiated either by PASSHE or by the Commonwealth. West Chester University has limited input into these negotiations, especially those negotiated by the Commonwealth. The only component of the permanent workforce that is not covered by collective bargaining agreements is composed of mid-level to senior managers and some technical personnel. For this group, the PASSHE Board of Governors sets the salary increase pool. Salary increases for the various classes of employees ranged from a low of 0% to a high of 6.2% for fiscal years 2000-01 through 2004-05. Increases in the last three fiscal years have been at the lower end of this range.

With the exception of fiscal year 2002-03, when positions were added, increases in salary expenses for West Chester University have primarily resulted from salary increases. It should, however, be noted that in fiscal year 2003-04, salary expenses actually decreased as a result of a conscious budget reduction plan. This plan was necessitated by repeated years of declining or flat Commonwealth appropriations to PASSHE. In total, salaries, wages, and benefits represent approximately 70% of the University's operating budget. The budgeted number of employees has remained fairly constant over the period and is shown below as fulltime equivalents (FTE):

|  | 2000-01 | 2001-02 | 2002-03 | 2003-04 | 2004-05 |
|---|---|---|---|---|---|
|  |  |  |  |  |  |
| Budgeted Employee FTE | 1,323.00 | 1,320.00 | 1,372.76 | 1,323.14 | 1,323.14 |

Benefits (particularly healthcare costs) and post-retirement expenses (primarily healthcare coverage for retirees) have increased significantly over the five-year period. Beginning in fiscal year 2004-05, however, employees of the University (and all of PASSHE) began sharing in the cost of the healthcare premiums. In addition, an employee deductible and higher co-pay were implemented for prescription drugs. On the other hand, employees who had retired prior to the implementation of these cost-saving measures were "grandfathered in" with the same healthcare benefits and costs as when they retired. For that reason, the retirements in

2003-04 were greater than normal, as some employees retired earlier than otherwise planned to preserve the more favorable benefits.

Below is a summary of the University's revenues and expenses for the fiscal years ending June 30, 2001 through 2005:

| | 2000-01 | 2001-02 | 2002-03 | 2003-04 | 2004-05 |
|---|---|---|---|---|---|
| **OPERATING REVENUES** | | | | | |
| Net tuition & fees | $ 57.0 | $ 58.4 | $ 66.4 | $ 69.4 | $ 74.6 |
| Governmental grants & contracts (federal and state) | $ 13.1 | $ 13.8 | $ 16.2 | $ 16.4 | $ 15.3 |
| Auxiliary enterprises, net of discounts | $ 18.2 | $ 18.0 | $ 20.0 | $ 21.4 | $ 20.7 |
| Other operating revenues | $ 2.7 | $ 3.0 | $ 2.9 | $ 3.1 | $ 6.6 |
| Total Operating Revenues | $ 91.0 | $ 93.2 | $ 105.5 | $ 110.4 | $ 117.2 |
| **OPERATING EXPENSES** | | | | | |
| Personnel Compensation | | | | | |
| Salaries | $ 72.6 | $ 73.9 | $ 78.4 | $ 74.3 | $ 78.7 |
| Benefits | $ 21.4 | $ 24.4 | $ 25.4 | $ 27.1 | $ 27.1 |
| Post Retirement Expense | $ 1.0 | $ 1.5 | $ 2.8 | $ 3.9 | $ 2.6 |
| Student Wages | $ 2.3 | $ 2.5 | $ 2.6 | $ 2.5 | $ 2.0 |
| Total Personnel Compensation | $ 97.3 | $ 102.3 | $ 109.1 | $ 107.8 | $ 110.4 |
| Telecommunications | $ 0.8 | $ 0.9 | $ 1.1 | $ 1.1 | $ 1.0 |
| Travel & Transportation | $ 1.4 | $ 1.3 | $ 1.3 | $ 1.2 | $ 1.5 |
| Computing & Data Processing | $ 1.3 | $ 1.3 | $ 1.8 | $ 1.8 | $ 1.9 |
| Professional & Contracted Services | $ 9.0 | $ 8.2 | $ 8.4 | $ 6.7 | $ 8.8 |
| Utilities | $ 4.6 | $ 4.7 | $ 5.5 | $ 5.3 | $ 5.8 |
| Food Supplies | $ 6.3 | $ 3.2 | $ 7.0 | $ 6.7 | $ 7.5 |
| Depreciation | $ 5.5 | $ 7.5 | $ 6.0 | $ 7.7 | $ 9.1 |
| Student Aid | $ 3.6 | $ 4.1 | $ 4.2 | $ 4.2 | $ 5.0 |
| Supplies & Other Current Charges | $ 5.4 | $ 5.6 | $ 3.2 | $ 6.0 | $ 7.1 |
| Total Operating Expenses | $ 135.2 | $ 139.1 | $ 147.7 | $ 148.5 | $ 158.1 |
| **NET OPERATING LOSS** | $ (44.2) | $ (45.9) | $ (42.2) | $ (38.2) | $ (40.9) |
| **NONOPERATING REVENUES** | | | | | |
| State appropriation, general and restricted | $ 46.4 | $ 46.8 | $ 44.6 | $ 44.0 | $ 47.5 |
| Investment income | $ 3.7 | $ 2.1 | $ 1.9 | $ 1.5 | $ 1.9 |
| Unrealized gain on investments | $ (0.6) | $ (0.9) | $ 0.0 | $ 0.9 | $ 0.7 |
| Gifts for other than capital purposes | $ 2.3 | $ 2.6 | $ 2.2 | $ 2.9 | $ 3.0 |
| Interest expense | $ (1.7) | $ (1.1) | $ (1.4) | $ (2.3) | $ (2.4) |
| Gain (loss) on disposal of assets | $ - | $ - | $ (0.1) | $ 0.0 | $ 0.0 |
| Other nonoperating revenue | $ 0.3 | $ 0.2 | $ 0.2 | $ 0.2 | $ 0.3 |
| Total Nonoperating Revenue | $ 50.4 | $ 49.7 | $ 47.6 | $ 47.2 | $ 51.0 |
| **INCOME BEFORE OTHER REVENUES** | $ 6.2 | $ 3.8 | $ 5.4 | $ 9.0 | $ 10.1 |
| **OTHER REVENUES:** | | | | | |
| State appropriation, capital | $ 0.9 | $ 1.0 | $ 0.7 | $ 1.2 | $ 1.6 |
| Capital gifts and grants | $ 0.2 | $ 0.6 | $ 0.5 | $ 0.9 | $ 12.2 |
| Additions from the Commonwealth | $ - | $ 1.4 | $ - | $ - | $ - |
| Additions to permanent endowments | $ 0.6 | $ 0.7 | $ 0.6 | $ - | $ - |
| Total Other Revenue | $ 1.7 | $ 3.7 | $ 1.7 | $ 2.1 | $ 13.8 |
| **INCREASE IN NET ASSETS** | $ 7.8 | $ 7.5 | $ 7.1 | $ 11.1 | $ 23.8 |
| **NET ASSETS (Restatements in 2001-02 & 2002-2003):** | | | | | |
| Beginning of year | $ 35.9 | $ 65.8 | $ 33.4 | $ 40.5 | $ 51.6 |
| End of year | $ 43.7 | $ 73.4 | $ 40.5 | $ 51.6 | $ 75.5 |

It should be noted that beginning with fiscal year 2001-02, PASSHE adopted the Governmental Accounting Standards Board (GASB) Statement 35. The major impact of this

statement was the reporting of financial information from a total entity perspective, rather than a fund perspective, as had occurred previously. For the sake of consistency and for purposes of comparison, the data above have been restated for fiscal year 2000-01 to conform to the new GASB reporting format that became effective with fiscal year 2001-02.

**Balance Sheet**

The University's total net assets increased almost 73%, from $43.7 million to $75.5 million between 2000-01 and 2004-05. Net assets are categorized as "invested in capital assets, net of related debt"; "restricted"; and "unrestricted."

- "Invested in capital assets, net of related debt" is the cost of land, buildings, improvements, equipment, furnishings, and library books; net of any accumulated depreciation; and any associated debt (bonds payable). The balance is not available for the University's use in ongoing operations since the underlying assets would have to be sold in order to use the balance to pay current and long-term obligations.

- "Restricted net assets" represent the balances of funds received from the Commonwealth, donors, or grantors who have placed restrictions on the purpose for which the funds may be spent. Nonexpendable restricted net assets represent corpuses of endowments and similar arrangements in which only the associated investment income can be spent. Expendable net assets are available for expenditure as long as any external purpose and time restrictions are met.

- "Unrestricted net assets" include funds that the Council of Trustees has not designated for specific purposes, auxiliary funds, and all other funds not appropriately classified as restricted or invested in capital assets.

    Unrestricted net assets represent a negative number because of two unfunded liabilities: first, the liability for compensated absences, which is cash paid to employees at termination for annual and sick leave balances, and second, the liability for postretirement benefits for employees. Because these liabilities are expected to be realized gradually over time and because of their size, the University funds them only as they become due. During the five-year period, these liabilities increased by approximately 21.5%, from $45.2 million to $54.9 million.

    Below is a summary of the University's balance sheet as of June 30, 2001 through 2005:

| | 2000-01 | 2001-02 | 2002-03 | 2003-04 | 2004-05 |
|---|---|---|---|---|---|
| **ASSETS** | | | | | |
| Cash & cash equivalents | $ 37.4 | $ 40.6 | $ 54.3 | $ 62.0 | $ 67.0 |
| Other current assets | $ 3.8 | $ 4.3 | $ 6.1 | $ 5.4 | $ 9.7 |
| Total current assets | $ 41.3 | $ 44.9 | $ 60.4 | $ 67.4 | $ 76.7 |
| Capital assets, net | $ 74.9 | $ 111.4 | $ 86.9 | $ 99.4 | $ 122.8 |
| Other noncurrent assets | $ 14.7 | $ 14.5 | $ 15.9 | $ 18.2 | $ 19.5 |
| Total noncurrent assets | $ 89.5 | $ 125.9 | $ 102.8 | $ 117.5 | $ 142.3 |
| TOTAL ASSETS | $ 130.8 | $ 170.8 | $ 163.2 | $ 184.9 | $ 219.0 |
| **LIABILITIES** | | | | | |
| Accounts payable & accrued expenses | $ 10.1 | $ 9.5 | $ 9.3 | $ 10.2 | $ 14.8 |
| Deferred revenue | $ 4.8 | $ 4.0 | $ 6.2 | $ 5.3 | $ 6.2 |
| Other current liabilities | $ 1.2 | $ 6.6 | $ 7.2 | $ 8.6 | $ 9.3 |
| Total current liabilities | $ 16.1 | $ 20.1 | $ 22.8 | $ 24.2 | $ 30.2 |
| Compensated absences & postretirement benefit obligations | $ 45.2 | $ 46.5 | $ 48.8 | $ 52.7 | $ 54.9 |
| Bonds payable | $ 24.5 | $ 22.5 | $ 41.2 | $ 38.9 | $ 38.5 |
| Other noncurrent liabilities | $ 1.3 | $ 8.4 | $ 9.9 | $ 17.5 | $ 19.9 |
| Total noncurrent liabilities | $ 71.0 | $ 77.4 | $ 100.0 | $ 109.1 | $ 113.3 |
| TOTAL LIABILITIES | $ 87.1 | $ 97.5 | $ 122.8 | $ 133.3 | $ 143.5 |
| **NET ASSETS (Restatements in 2001-02 & 2002-03)** | | | | | |
| Invested in capital assets, net of related debt | $ 58.2 | $ 87.0 | $ 55.3 | $ 55.6 | $ 72.8 |
| Restricted | $ 20.1 | $ 15.2 | $ 13.4 | $ 15.3 | $ 17.3 |
| Unrestricted | $ (34.6) | $ (28.8) | $ (28.3) | $ (19.3) | $ (14.6) |
| TOTAL NET ASSETS | $ 43.7 | $ 73.4 | $ 40.5 | $ 51.6 | $ 75.5 |
| TOTAL LIABILITIES & NET ASSETS | $ 130.8 | $ 170.8 | $ 163.2 | $ 184.9 | $ 219.0 |

It should be noted that the opening balances in fiscal years 2001-02 and 2002-03 were restated in the audited financial statements. In fiscal year 2001-02, the balance was adjusted by approximately $22 million, which was a combination of the implementation of GASB statements 34 and 35 and of a requirement by the independent audit firm to include capital assets that were within the geographic boundaries of West Chester University but titled in the name of the Department of General Services, Commonwealth of Pennsylvania. The decision regarding the titling of capital assets was reversed in fiscal year 2002-03, and the opening fund balance was adjusted accordingly. The adjustment in fiscal year 2002-03 was approximately $40 million.

**Other Issues**

West Chester University is noted for its entrepreneurial endeavors that include strategic partnerships and alternative methods of building and financing major construction projects.

During the period, the University entered into an agreement with the Borough of West Chester to construct and operate two parking garages. This agreement has been recorded as a capital lease obligation by the University. One of the parking garages was completed in the fall of 2003, while the other was completed in the fall of 2004. The projects were financed through a general revenue bond issuance of $9.6 million, dated April 2003 and issued by the borough.

The Fund for West Chester University was established in 2001 with the specific purpose of performing fundraising for the educational, charitable, and scientific interest of the University. The Fund, a component unit of West Chester University, includes a wholly-owned subsidiary, University Student Housing, LLC (USH).

The purpose of USH is to develop, design, finance, construct, and operate new housing for the students of West Chester University. USH and the University entered into a ground lease by which USH agreed to construct apartment-style housing on South Campus and suite-style housing on North Campus. This housing, which was completed in the late summer and fall of 2004, accommodates approximately 790 students. Non-recourse revenue bonds for $42.3 million were issued by USH through the Chester County Industrial Development Authority in August of 2003. For fiscal year 2004-05, the projects were 100% leased at the beginning of the fall semester.


## FISCAL TRENDS AND PROJECTIONS

### Overview
West Chester University will remain fiscally sound during the five-year projection period of 2005-06 through 2009-10. Financial challenges will increase, however.

Collective bargaining agreements with PASSHE's two largest employee unions, APSCUF and AFSCME, end June 30, 2007. The existing contracts froze salary increases in fiscal year 2003-04 and provided only modest increases in fiscal years 2004-05 and 2005-06. On the other hand, in the last year of the contract, 2006-07, salaries will increase significantly. The full budgetary impact of these salary increases will occur in fiscal year 2007-08.

Increased fuel costs could also negatively impact the University's budget, but the University should have sufficient budget flexibility to absorb these additional costs, at least in 2005-06 and 2006-07.

As has occurred at the national level, healthcare costs for West Chester University have increased in recent years and are projected to increase further. As noted above, however, beginning with fiscal year 2004-05, employees of West Chester University (and PASSHE as a whole) started to share in the cost of healthcare. PASSHE also implemented a Healthcare Cost Containment Committee to study ways to contain costs while still providing quality services to employees.

The factors mentioned above could significantly reduce the University's flexibility, possibly as early as 2007-08, and might necessitate alternative and less costly methods of providing some support services. In anticipation of budget constraints within the next several years and to ensure that funds are available for key priorities, the University's Administrative Budget Committee (ABC) is continuing to evaluate possible areas for reduction or elimination. The key criterion is how well a particular activity or function supports the University's strategic plan, *A Plan for Excellence*. Even for those activities and functions that strongly support the *Plan*

*for Excellence*, the ABC is examining possible means by which services could be delivered less expensively and more effectively.

**Revenues**

The appropriation from the Commonwealth allocated to West Chester University for fiscal year 2005-06 reflects the last increase associated with PASSHE's phase-in of the new allocation formula and increases in performance funding. The full effect of the change in the allocation formula provides the University with approximately $4.8 million annually in additional funding beyond the level of the prior formula. Nevertheless, the University will have limited gains from the changed allocation formula beyond fiscal year 2005-06. In addition, the many competing priorities of the Commonwealth will likely result in limited appropriation increases. For fiscal years 2006-07 through 2009-10, Commonwealth appropriations allocated to the University are expected to increase an average of only 2% per year.

The political climate in Pennsylvania and the general sensitivity to large tuition increases have led the University to plan for tuition and fee increases to average only 2% per year for fiscal years 2005-06 through 2009-10. Rates for food service and housing are projected to increase an average of 3% per year, except for rates in fiscal year 2005-06, which have already been determined at a higher level.

Because West Chester University is close to capacity for students on its North and South campuses, undergraduate enrollment is expected to be relatively flat over the five-year period. In contrast, graduate enrollment, which is often delivered at non-peak hours or at remote sites, such as the Graduate Business Center, is expected to increase approximately 15% during the five-year period. Overall enrollment is expected to increase approximately 3.7% during the five-year projection period.

**Expenses**

Salaries represent by far the largest component of operating expenses. For fiscal years 2005-06 and 2006-07, the salary increases for the two major bargaining units (for faculty and support staff) are set by the current contract. Beyond fiscal year 2006-07, new contracts, which are negotiated either by PASSHE or by the Commonwealth, will determine the salary increases for these bargaining units. The University is projecting that approved salary increases for these years will be approximately the following:

| | |
|---|---|
| 2007-08 | 5% for all employee classes |
| 2008-09 | 3% for all employee classes |
| 2009-10 | 3% for all employee classes |

Due to anticipated healthcare costs, the benefits for active employees are expected to increase generally at a slightly higher rate than salaries. On the other hand, postretirement expense, which is largely health insurance for retirees, is projected to show double-digit increases. Retirees receive healthcare benefits that were in effect when they retired. Therefore, many of the recent changes to contain healthcare costs will affect only the newest retirees and will not produce the same level of savings as with active employees.

As mentioned previously, expenses for utilities are projected to increase significantly. As a result, the University's budget flexibility will be reduced during the projection period.

Below is a projected statement of revenues and expenses for the fiscal years ending June 30, 2006 through 2010:

| | Actual | Projected | | | | |
|---|---|---|---|---|---|---|
| | 2004-05 | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 |
| **OPERATING REVENUES** | | | | | | |
| Net tuition & fees | $ 74.6 | $ 76.7 | $ 78.5 | $ 80.4 | $ 82.3 | $ 84.3 |
| Governmental grants & contracts (federal and state) | $ 15.3 | $ 15.3 | $ 15.3 | $ 15.3 | $ 15.3 | $ 15.3 |
| Auxiliary enterprises, net of discounts | $ 20.7 | $ 21.6 | $ 22.3 | $ 23.0 | $ 23.6 | $ 24.4 |
| Other operating revenues | $ 6.6 | $ 6.8 | $ 7.0 | $ 7.2 | $ 7.4 | $ 7.7 |
| Total Operating Revenues | $ 117.2 | $ 120.5 | $ 123.1 | $ 125.9 | $ 128.7 | $ 131.6 |
| **OPERATING EXPENSES** | | | | | | |
| Personnel Compensation | | | | | | |
| Salaries | $ 78.7 | $ 81.5 | $ 85.2 | $ 89.0 | $ 91.4 | $ 94.0 |
| Benefits | $ 27.1 | $ 28.6 | $ 30.9 | $ 32.4 | $ 34.4 | $ 36.7 |
| Post Retirement Expense | $ 2.6 | $ 2.9 | $ 3.2 | $ 3.6 | $ 4.1 | $ 4.7 |
| Student Wages | $ 2.0 | $ 2.0 | $ 2.0 | $ 2.1 | $ 2.1 | $ 2.1 |
| Total Personnel Compensation | $ 110.4 | $ 114.9 | $ 121.3 | $ 127.0 | $ 132.1 | $ 137.6 |
| Telecommunications | $ 1.0 | $ 1.0 | $ 1.0 | $ 1.1 | $ 1.1 | $ 1.1 |
| Travel & Transportation | $ 1.5 | $ 1.5 | $ 1.6 | $ 1.6 | $ 1.6 | $ 1.7 |
| Computing & Data Processing | $ 1.9 | $ 1.9 | $ 2.0 | $ 2.0 | $ 2.1 | $ 2.1 |
| Professional & Contracted Services | $ 8.8 | $ 9.1 | $ 9.3 | $ 9.6 | $ 9.9 | $ 10.2 |
| Utilities | $ 5.8 | $ 7.0 | $ 7.8 | $ 7.9 | $ 8.2 | $ 9.4 |
| Food Supplies | $ 7.5 | $ 7.7 | $ 8.0 | $ 8.2 | $ 8.5 | $ 8.7 |
| Depreciation | $ 9.1 | $ 9.6 | $ 10.0 | $ 10.5 | $ 11.1 | $ 11.6 |
| Student Aid | $ 5.0 | $ 5.1 | $ 5.2 | $ 5.3 | $ 5.4 | $ 5.5 |
| Supplies & Other Current Charges | $ 7.1 | $ 7.3 | $ 7.4 | $ 7.6 | $ 7.8 | $ 7.9 |
| Expenditure Reduction Initiatives | | | | $ (0.5) | $ (1.0) | $ (2.0) |
| Total Operating Expenses | $ 158.1 | $ 165.1 | $ 173.6 | $ 180.3 | $ 186.8 | $ 193.9 |
| **NET OPERATING LOSS** | $ (40.9) | $ (44.6) | $ (50.5) | $ (54.4) | $ (58.1) | $ (62.2) |
| **NONOPERATING REVENUES** | | | | | | |
| State appropriation, general and restricted | $ 47.5 | $ 52.0 | $ 53.0 | $ 54.1 | $ 55.2 | $ 56.3 |
| Investment income | $ 1.9 | $ 1.9 | $ 2.0 | $ 2.1 | $ 2.1 | $ 2.2 |
| Unrealized gain on investments | $ 0.7 | $ 0.7 | $ 0.7 | $ 0.7 | $ 0.7 | $ 0.7 |
| Gifts for other than capital purposes | $ 3.0 | $ 3.0 | $ 3.0 | $ 3.0 | $ 3.0 | $ 3.0 |
| Interest expense | $ (2.4) | $ (2.2) | $ (2.1) | $ (1.8) | $ (1.7) | $ (1.8) |
| Gain (loss) on disposal of assets | $ 0.0 | $ - | $ - | $ - | $ - | $ - |
| Other nonoperating revenue | $ 0.3 | $ 0.3 | $ 0.3 | $ 0.3 | $ 0.3 | $ 0.3 |
| Total Nonoperating Revenue | $ 51.0 | $ 55.7 | $ 56.9 | $ 58.4 | $ 59.6 | $ 60.7 |
| **INCOME BEFORE OTHER REVENUES** | $ 10.1 | $ 11.1 | $ 6.4 | $ 3.9 | $ 1.6 | $ (1.5) |
| **OTHER REVENUES:** | | | | | | |
| State appropriation, capital | $ 1.6 | $ 1.0 | $ 1.0 | $ 1.0 | $ 1.0 | $ 1.0 |
| Capital gifts and grants | $ 12.2 | $ 8.0 | $ 4.0 | $ 1.0 | $ 1.0 | $ 1.0 |
| Additions from the Commonwealth | $ - | $ - | $ - | $ - | $ - | $ - |
| Additions to permanent endowments | $ - | $ - | $ - | $ - | $ - | $ - |
| Total Other Revenue | $ 13.8 | $ 9.0 | $ 5.0 | $ 2.0 | $ 2.0 | $ 2.0 |
| **INCREASE IN NET ASSETS** | $ 23.8 | $ 20.1 | $ 11.4 | $ 5.9 | $ 3.6 | $ 0.5 |
| **NET ASSETS:** | | | | | | |
| Beginning of year | $ 51.6 | $ 75.5 | $ 95.6 | $ 107.0 | $ 112.9 | $ 116.5 |
| End of year | $ 75.5 | $ 95.6 | $ 107.0 | $ 112.9 | $ 116.5 | $ 116.9 |

## Other Issues

West Chester University is currently engaged in several construction and renovation projects and has several more planned for the near future. Projects directly related to student

services (e.g., the current expansion of the dining hall and the planned construction of a recreation center) will be funded from student fees, both for debt service and for operation. Those projects that support the academic mission (e.g., the current construction of a performing arts center and the planned construction of an undergraduate business building) will be funded from Commonwealth and/or University funds for the construction component.

The addition of this new academic space, however, may put further pressure on the University's operating budget. Although the allocation formula (previously discussed) does provide additional funding for new academic and administrative space, there is no guarantee that this funding will be sufficient to cover the additional expenses of operating the new academic buildings. The dining hall is expected to be completed in the spring of 2006; The Swope Music Building and the Performing Arts Center is scheduled to be completed in the summer of 2006; the recreation center is likely to be completed very late in the five-year projection period; and the undergraduate business building is likely to be completed after the projection period. With the exception of utilities for the performing arts center, neither additional operating costs nor additional revenues associated with these facilities have been included in the projections.

The University, in conjunction with USH, is currently developing a housing master plan for the replacement of much of the existing older housing and the possible construction of additional housing on campus over the next 10 to 12 years. It appears likely that this housing will be developed and operated by USH. Because most of the new and replacement housing will be completed after the five-year projection period, neither reductions in revenue nor reductions in expenses for auxiliary operations have been included in the projections.

The University is also in the early stages of planning for the construction of a parking garage on the western part of North Campus. As preliminarily proposed, this parking garage would be supported by user fees, for both debt service and operation. If this project moves forward, it is likely that the University will enter into an agreement with the Borough of West Chester to construct and operate this garage. As explained above, the University and the borough entered into similar agreements for two existing parking garages, one of which was completed in fall 2003 and the other in summer 2004. The borough is currently operating both facilities on behalf of the University.

The University has also contracted with an energy savings company to recommend and implement facilities improvements and renovations to help reduce the University's annual utility bill. The University conservatively estimates almost $8 million in net savings/cost avoidance over a 15-year period. Those estimated savings will be used to fund necessary deferred maintenance projects that will be accomplished at the same time as the energy-savings improvements and renovations.

**Summary and Outlook**
West Chester University is in an enviable position in higher education, especially in comparison to its sister institutions within PASSHE. Because of its geographic location, West Chester University benefits from a pool of potential students that is continuing to grow. In addition, WCU is more than competitively priced relative to its regional competition, most of which comprises private institutions.

In the next five years, West Chester University will continue to be financially sound, while providing a high-quality education to its students. In addition, student interest in West Chester University will remain strong, although enrollment growth will be limited by design.

The challenges facing the University over the next five years will be substantial, but certainly not insurmountable. Rising costs for salaries, benefits, and energy, as well as additional operating costs for new facilities, will constrain the University's budget. At the same time, the political climate in Pennsylvania will likely mean that increases in the Commonwealth appropriation and increases in rates for tuition and fees will be limited.

To meet these challenges, the University is continuing to examine current functions and activities in relation to the *Plan for Excellence* to determine possible areas for reduction or elimination and to determine how services can be provided less expensively and more effectively.

To a large extent, the University's future success will continue to result from the appropriate combination of seemingly contradictory approaches—conservative budgeting and entrepreneurial risk-taking. The flexibility afforded by the former makes the latter possible. Together, they provide West Chester University with the means to anticipate and respond to changing environmental conditions.

# Chapter 5
## Assessment Processes and Plans

West Chester University has well-developed plans and procedures for carrying out student-learning-outcomes and institutional assessment.

## STUDENT LEARNING OUTCOMES ASSESSMENT

West Chester University began planning the formal assessment of student learning in 1996 and has been engaged in student learning outcomes assessment since 1998. Throughout the entire process, the assessment of academic programs has been led, designed, and implemented by the faculty, while the student affairs staff has implemented the assessment of co-curricular learning, and a wide range of assessment measures and methodologies are in use. Assessment has been guided by Middle States' *Framework for Outcomes Assessment* (1996), Middle States' *Student Learning Assessment: Options and Resources* (2003), Standard 14 of *Characteristics of Excellence* (2002), and *Assessing Student Learning Outcomes* (Policy 1997-01) issued by the State System's Board of Governors (1997).

An assessment planning taskforce, consisting of faculty and student affairs staff, was established in 1996 and recommended an assessment structure and process. In 1997, the University adopted an assessment plan, appointed an assessment coordinator (a faculty member with relevant expertise), and created the Student Learning Outcomes Committee (SLOC), composed of faculty and student affairs representatives. The coordinator and SLOC guided departments, programs, and administrative units in developing and implementing their assessment plans. Each department and administrative unit appointed an assessment liaison, who usually chaired a committee that developed and implemented the department or unit assessment plan. University resources were allocated to provide released time for the coordinator, training workshops and travel to conferences for faculty, funding for pilot projects, a collection of resource materials, and recognition for exemplary plans.

In 1998, all departments, programs, and administrative units were required to submit assessment plans, which were then reviewed by the coordinator and SLOC. Also expected was the development of action plans based on assessment results. The specific areas of assessment included the following:

1. Basic skills or developmental programs
2. General education (assessed by CAPC)
3. Undergraduate academic programs
4. Academic minors (where no majors are present)
5. Graduate programs
6. Co-curricular programs
7. Interdepartmental programs

The first six areas are required by PASSHE policy, and the seventh was recommended by the assessment planning taskforce. By fall 2000, all programs had had their assessment plans reviewed by the assessment office. Approximately 200 assessment plans for 69 programs were constructed and submitted for review. Thus, at the time of the 2001 self-study, student learning outcome plans had been developed for every relevant program and implementation had begun. Currently, all programs have implemented assessment and have had a review of their implementation and action plans.

By 2004, the assessment coordinator and SLOC realized that the University needed to be more proactive and supportive to institutionalize assessment further and develop a higher level of commitment to the process across the University. The provost initiated a review of the current status of assessment, appointing a faculty/administration taskforce composed of the assessment coordinator, the General Education Committee chairperson, the director of Institutional Research, the Middle States liaison, and the NCATE liaison. The taskforce identified issues and developed a revised assessment framework. The following issues were identified:

- Improving the level of consistency in assessment efforts across the campus

- Engaging additional senior faculty in assessment activities

- Developing a consistently high level of expertise in assessment across the campus

- Reviewing and revising the infrastructure for assessment

- Creating additional support structures for assessment

- Implementing fully all assessment plans

- Expanding the pace of course-level assessment within general education

- Designing a process for ongoing, continuous assessment

- Including the new information literacy requirement in general-education and other program assessment

- Ensuring that the departments and programs include an update about their assessment plan and the plan's implementation in their annual reports

- Planning assessments that yield data for improvement plans

- Reporting assessment activities, including program improvements resulting from assessment

A new assessment plan was approved in spring 2005. With the adoption of the new plan, department chairpersons' and deans' annual reports and PASSHE program reviews are now required to include a report on assessment activities. This new mandate has eliminated isolated and duplicate reporting. In fact, it has prompted the sharing of assessment practices and the use of assessment results among departments and programs. It has also institutionalized assessment as a permanent process. Deans have responsibility for coordinating and monitoring assessment in their areas. The new Middle States requirement on information literacy is also being incorporated into program assessment and reporting. (See the appendices for the details of the 2005 West Chester University Assessment Plan.)

**General Education Assessment**

In 2001, the Middle States Self-study review team identified as a critical need that West Chester University conclude its deliberations concerning general education and develop a general education curriculum that supports student success and lifelong learning. The Curriculum and Academic Policies Council (CAPC) subsequently endorsed a new, more coherent general education curriculum. As part of the new General Education Program, new goals and an assessment system were also proposed. Specifically, a new General Education Program Assessment Plan was passed by CAPC in May 2004. This document (in the appendices) maps specific learning outcome objectives for the seven general education goals. Appropriate types of data collection, timelines for data collection, and the synthesis of results are also articulated in the General Education Program Assessment Plan.

The review and revalidate (R2) process reviews the general education goals listed for each course sanctioned by CAPC to be a general education requirement. As a first step, the specific courses objectives, learning activities, and course assessments are explicitly linked to the general education goals or subgoals for the course. This linkage is accomplished jointly by both the faculty and the CAPC Program Review Committee. Next, multiple sources of data are collected to triangulate student success evidence in each of the goal or subgoal areas. These findings are shared with the CAPC Program Review Committee and relevant faculty. Finally, course improvements based on these findings are articulated.

The CAPC Program Review Committee has also created a Web site (http://www.webcourse.com/CAPC/) to post assessment plans developed by each department.

In fall 2004, an evaluation of the General Education Program as a whole began. Students enrolled in 35 courses participated in a pilot survey to discern the current levels of knowledge in the seven general education areas. Results indicate that the majority of students believe that general education goals are being met in their courses and most were able to identify specific general education courses that fostered specific general education goals. Another survey was conducted in spring 2006, and specific assessment techniques from the assessment template were implemented in several courses. Results will be analyzed in summer 2006. See chapter 2 for a detailed discussion of revisions to the General Education Program and its assessment.

**Information Literacy Assessment**

West Chester University has begun planning to meet the Middle States Information Literacy Standard for its next decennial review, in 2011. Led by the director of Library Services and the information literacy librarian hired in 2001, the University has been informing faculty about the standard in a variety of ways and has encouraged departments to develop plans for assessing information literacy in the majors and in general education courses. As of 2005, departmental annual reports must include information on their assessment of information literacy. The Deans Council and the CAPC General Education Committee have agreed to the following definition of information literacy: "Information literacy is the array of knowledge and skills necessary to identify the information needed for a task and then to locate, understand, evaluate, and use that information efficiently and effectively within appropriate ethical and legal limits."

## PROGRAM REVIEW

Program review assures deliberate and continuous attention to quality enhancement and to the mission centrality of academic and academic- and student-support programs. All academic departments and the five divisions engage in regular program review, with each academic program and student support area scheduled to be evaluated every five years. The associate vice president for academic affairs coordinates all program reviews. (The program review schedule for the academic programs and student-support services is included in the appendices.)

At the heart of the program review process is learning outcomes assessment, which is accomplished by administering alumni surveys, conducting employer interviews, tracking student performance on licensure examinations, compiling graduate and professional school acceptance rates, and compiling economic and community contributions. Other learning outcome measures include performance in capstone courses, portfolio assessment, and supervisor evaluation of internship and field experiences. Historical performance on these learning outcomes is compared to current learning outcomes performance. Student success indicators are further judged against PASSHE and national institutional peer performance.

Also reviewed are

- Program organization
- Program structure
- Faculty credentials and diversity
- Student diversity
- Library and other learning resources
- Academic policies, standards, and grading practices

In addition, program review examines the efficacy of resources allocated to the program or service area, such as faculty productivity, faculty achievement and scholarship, appropriateness of facilities, use of technology, and size of faculty complement. Evaluators external to a department are appointed to review its programs and services. Often the external evaluators are national or regional leaders in that program area.

Recommendations for improvement made by the program review evaluators are examined by the department staff and the appropriate vice president. Faculty/staff in each program must then develop an implementation plan for continuous enhancement by building upon strengths and addressing challenges. The implementation plan must include goals and action items to be accomplished by the next review period.

## SPECIALIZED PROGRAM ACCREDITATIONS

West Chester University takes pride in the achievement of specialized accreditations in specific areas. More than 20 degree programs are accredited by national accreditation agencies.

All degree programs in music performance are accredited by the National Association of Schools of Music (NASM). Both the Master of Science in Nursing and the Bachelor of Science in Nursing are accredited by the National League for Nursing Accrediting Commission (NLNAC). Both the Master of Social Work and the Bachelor of Social Work are endorsed by the Council on Social Work Education (CSWE). The Master of Public Health is accredited by the Council on Education for Public Health (CEPH), and the Bachelor of Science in Public Health-Health Promotion is accredited by the Commission on Accreditation for Dietetics Education-American Dietetics (CADE). The Bachelor of Science in Computer Science is certified by the Accreditation Board for Engineering and Technology (ABET).

All teacher education programs are accredited by the National Council on the Accreditation of Teacher Education (NCATE) and the Pennsylvania Department of Education (PDE). These accreditations entail comprehensive and systematic assessment of students' teaching, other field and practicum experiences, curriculum construction, lesson plan and unit plan development, and testing instruments and simulations. In part, these assessments are being facilitated by the students' use of *LiveText*. This courseware package helps faculty establish consistent evaluation and scoring rubrics across course sections, maintain portfolios of student work, and provide consistent and immediate feedback to the student, other faculty, and practicum supervisors.

The College of Business and Public Affairs is currently seeking accreditation from the Association to Advance Collegiate Schools of Business (AACSB). The AACSB self-evaluation report was due April 1, 2006, and the site team visit is scheduled for October 2006.

The Department of Theatre and Dance is seeking accreditation by the National Association of Schools of Theatre (NAST). The self-study process began in 2005-06, and a NAST visit is planned for 2008.


**PENNSYLVANIA STATE SYSTEM OF HIGHER EDUCATION ACCOUNTABILITY MEASURES**

WCU's *Plan for Excellence* parallels the Pennsylvania State System of Higher Education strategic planning efforts. Although the PASSHE strategic plan was revamped in 2005, the *Plan for Excellence* remains in accord with the State System plan, *Leading the Way* (included in the appendices). The five transformations that compose the *Plan for Excellence* strongly reinforce the five PASSHE strategic goals (see the appendices). As a member of PASSHE, the University is subject to 17 accountability performance areas that assess effectiveness, efficiency, and academic excellence. In other words, the University is measured on how well it is aligned with the PASSHE strategic goals in *Leading the Way*. Correspondingly, the 17 PASSHE accountability measures provide an excellent supplement to the rigorous campus-imposed institutional assessment structure.

The PASSHE accountability measures focus on retention and graduation rates, number of specially accredited programs, Praxis pass rates, diversity of enrollment, percent of degrees conferred, transfers from community colleges, instructional cost, faculty productivity, private

support, and percent of faculty with terminal degrees. Performance results on the PASSHE accountability measures are compared with those of a PASSHE selected national peer group as well as with the performance of the other 13 PASSHE institutions. Seven of the accountability measures also are measured for PASSHE performance funding. Each PASSHE institution is awarded a percentage of the available annual state funding based on their performance on one-year retention, four- and six-year graduation rates, the ratio of degrees awarded to enrollment, faculty productivity, employee diversity, the percentage of faculty with terminal degrees, and instructional cost.

In both 2003 and 2004, West Chester University earned more "Benchmark Met" or "Benchmark Exceeded" ratings than the other 13 PASSHE schools. In other words, West Chester University fared better in comparison to its national peers than any other PASSHE school. Notably, in 2005, the University garnered "Target Met" or "Target Exceeded" results on all but one accountability sub-measure, exceeding its own prior record and that of the other PASSHE institutions. In 2004 and 2005, West Chester University had the highest one-year retention rate of all PASSHE institutions and continued to rank at the 91st percentile for all public Master's I CSRDE participants. In the same time frame, West Chester University was ranked fourth in overall four-year graduation rates and third in six-year graduation rates with respect to the other PASSHE schools.

Between 2002 and 2005, West Chester University received $8,864,446 in performance funding from PASSHE, and the University continues to increase its performance funding award annually, as seen in the table below. Note that between academic years 2004 and 2005, PASSHE increased the percentage of state funding allocated to performance funding from five to seven percent.

| PASSHE Performance Funding Awards | | |
|---|---|---|
| Year | Performance Funding Amount | One-Year Change |
| 2002 | $947,255 | -- |
| 2003 | $1,349,839 | 42.50% |
| 2004 | $2,130,071 | 57.80% |
| 2005* | $4,437,281 | 108.3% |
| *Total* | *$8,864,446* | |

* The percent of state allocation towards performance funding increased from 5% to 7% in 2005.

## EVALUATION OF FACULTY

The West Chester University faculty is dedicated to teaching and student success, scholarship, and service to the University. To obtain tenure, faculty are evaluated on three criteria: effective teaching, continuing scholarly growth, and service. Effective teaching includes instruction and advising, administrative assignments, and professional responsibilities. Scholarly activity refers to contributions to refereed publications; regional or national conference

presentations, exhibits, or performances; and/or grant awards. Service pertains to voluntary activities that contribute to the profession, the University, and/or the community. The tenure process is overseen by the University Tenure and Promotion Committee (TeP) and departmental evaluation committees. TeP is responsible for considering and making all tenure recommendations. TeP also provides training in evaluation and tenure policies to TeP members, faculty, department chairpersons, and departmental evaluation committees. In addition, the committee offers individualized training to faculty members and departments in the preparation for tenure. TeP is also charged with reviewing the evaluation and promotion process and with recommending modifications.

West Chester University conducts a comprehensive student evaluation of faculty teaching. Developed internally and instituted in fall 2000, the purpose of the Quality Instructional and Course Report Rating Form (QUIC) is threefold. First and foremost, the QUIC process promotes instructional improvement. Second, the QUIC is used to assess instructional behaviors known to be correlated with effective learning. Third, the student evaluation results are used in tenure and promotion decisions to promote effective teaching strategies. The QUIC consists of seven categories, six of which correspond to effective instructional behaviors: course organization and planning, communication, faculty/student interaction, assignments, exams, grading, course outcomes, and overall evaluation. The seventh category pertains to reasons the student enrolled in the course, instructional method, and the student's self-reported effort put forth in the class.

There are several advantages to conducting in-house student evaluation of faculty teaching. First, the institution has constructed a reporting system tailored to departmental needs concerning faculty feedback, the tenure and promotion process, and improvement of faculty instruction. Second, comparative information is easily obtained and can be customized to the department's instructional requirements. Third, every fall and spring semester, the faculty, department evaluation committees, and TeP receive departmental, college, and University comparative results. The QUIC is included in the appendices.


**INSTITUTIONAL RESEARCH AND REPORTS**

**Office of Institutional Research**
The Office of Institutional Research (OIR) reviews the annual evaluation of the transformations contained in the *Plan for Excellence*; compiles the PASSHE accountability measure results; conducts several cohort studies; and administers the faculty evaluations, conducts other institutional surveys, and supports the program review process. Institutional Research also makes available several institutional reports via the annual *Institutional Factbook*, the University Web site, and other campus communications.

For the PASSHE accountability measures, Institutional Research provides additional support by disaggregating the accountability measure results by academic department and, when applicable, by program. This process enables the accountability measure results to be available to department chairpersons and faculty at a level in which modification and improvement to academic programming can be made.

Each semester Institutional Research provides the Diversity Report. The Diversity Report consists of the number and percentage of minority students in each academic program and the number and percentage of minority faculty in each department. Each percentage is assigned a diversity index. The diversity index depicts the department's standing with relation to the diversity of the University. The indices are color coded and presented in a "dashboard" format so that department chairpersons and deans can quickly and easily decipher whether that department ranks in the top third, the middle third, or the bottom third compared to all departments at the University.

## Institutional Studies

Institutional Research engages in several student studies to assess the academic quality of the University's academic programs and student support services. As one example, first semester grade point averages, attempted credits, and earned credits (proxies for student success) are regressed using several predictor variables—mainly high school GPA, high school rank, and SAT scores. These analyses are reported separately for each freshmen type, ethnicity, and department. With this information, each department and the Academic Development Program (ADP) can evaluate the effectiveness of admission decisions, intervention programs, and advisement implemented in the first semester. Institutional Research also conducts longitudinal studies tracking student success during the first four semesters. Again, student success between regular admit first-year students and ADP students is distinguished. Another set of longitudinal analyses involves students who were degree seeking but did not declare a major in the first semester or year of study as compared to all first-year students. Here, too, semester GPA, cumulative GPA, average semester earned credits, cumulative earned credits, and number of major changes are used as student success measures.

Available to the campus is a retention and graduation flow model. This flow model compiles one- to six-year retention and graduation rates for several student cohorts, including first-year, transfer, and graduate students. The flow models are available via several hard copy reports, the annual *Institutional Factbook*, and the Institutional Research Web page.

In conjunction with the Retention Committee, Institutional Research is building a retention predictive model. It is anticipated that by incorporating several student demographics, CIRP survey information, and information obtained from other databases and surveys, a predictive model will demonstrate the relationship of preadmission variables, student proclivities, and student academic performance to retention and graduation. With this data, specific intervention strategies can hone in on student behaviors that are not conducive to success in college and reinforce those activities that have been shown to be associated with student retention and graduation.

## Institutional Reports

West Chester University created an extensive electronic reporting system accessible to most staff and faculty. REVIEW, a menu-driven report system, provides current semester and historical information on applicants, enrollment, completions, grade distributions, credit hour and tuition generation, and faculty. Data can be aggregated, in most cases, by program, department, college, division, or university. Hence, comparison and benchmark data can be established with

other campus entities. Much of the information needed for program review can be gleaned from these reports. A sophisticated query system contained in REVIEW provides information drilled down to end-user specifications.

A PeopleSoft Report Taskforce, encompassing several academic and administrative departments, is working diligently to enable these reporting capabilities in PeopleSoft. Several fiscal reports are already available in PeopleSoft. All budget administrators are granted access to their departments' account balances, purchase order status, encumbrances, and expenditures. These reports are updated bi-monthly. Some of the information in REVIEW and the fiscal reports are also available on the OIR Web page.

Reinstituted in 2003, the annual *Institutional Factbook* provides current historical data on admissions, enrollment, faculty, staff, retention, degrees conferred, accredited programs, tuition, expense and revenue information, the library, and facilities. The 2003, 2004, 2005, and 2006 factbooks are also available on the OIR Web page. Both the annual *Institutional Factbook* and the Web page contain surveys asking end-users for feedback on the information included in these publications.

A fourth venue for obtaining information at West Chester University is the intranet. The OIR Web site provides easy navigation to a plethora of institutional data in a format preferred by most campus constituencies. In 2003, the OIR Web site was updated in response to increased campus requests for institutional information. Specifically, the OIR site includes historical and current information on student characteristics, departmental productivity, retention rates, graduation rates, and course counts. Linked to the Web site are past and present annual factbooks for both the University and PASSHE. Hence, comparison with the other PASSHE schools is easily accomplished. The annual *Institutional Factbook* is bookmarked for ease of Web searching. In 2004, departmental and program information was posted on the OIR site. A new section, Enrollment Maps, was incorporated in spring 2005. These enrollment maps provide enrollment information in concise graphical formats that are beneficial to Admissions, Marketing, the Graduate Office, and SPRC. The OIR Web page can be accessed at http://orp.wcupa.edu/.

**Institutional Surveys**

West Chester University also uses nationally normed surveys regarding student engagement with faculty, library usage, and educational and career goals. Coupled with internally developed surveys to assess student satisfaction and involvement, these studies afford the institution additional assessment of learning and teaching practices. The University participates in or has conducted the following survey projects. A description of and the University's performance on the surveys are included in the appendices.

- Academic Advising Survey (internal)

- Association of Research Libraries, LibQUAL+ Survey

- Alumni Survey (internal)

- Athletic Interest Survey (internal)

- Office of Social Equity Campus Climate Survey (internal)

- The Cooperative Institutional Research Program (CIRP) Entering Student Survey
- The Consortium of Student Retention Data Exchange (CSRDE)

# Chapter 6
## Linked Institutional Planning and Budgeting Processes

**WEST CHESTER UNIVERSITY'S STRATEGIC PLAN, *A PLAN FOR EXCELLENCE***

The *Plan for Excellence*, West Chester University's strategic plan, provides the basis for campus decision making, new initiatives, assessment, institutional research, and ultimately the improvement of the University's ability to offer quality academic programming. (The *Plan for Excellence* is included in the appendices.)

Developed in 1999, the *Plan for Excellence* was adopted officially by the University in fall 2000. The *Plan* reflects the outcome of several extensive external, internal, and competitive-advantage scans. Combining the results of these studies, the *Plan* comprises five main goal areas or transformations: Responsiveness, Student Success, Diversity, Human Capital, and Resourcefulness.

The prime responsibilities of the Strategic Planning Resource Council (SPRC) are to monitor the *Plan for Excellence*, keep the University community informed about implementation of the *Plan*, seek input from the University community and other constituents, make recommendations regarding the progress of the *Plan*, periodically update the internal and external scans that were critical plan components, and assist the University with major changes to the *Plan*. SPRC also evaluates and recommends Presidential Initiative funds for special initiatives that advance one or more of the transformations in the *Plan for Excellence*.

SPRC monitors fulfillment of the *Plan for Excellence* and submits reports to the President's Cabinet. To ensure constancy and awareness of the *Plan*, each of the five divisional vice presidents is assigned to champion one of the five transformations. Daily or weekly accomplishments that advance the *Plan* are monitored by the vice presidents and reported to the President's Cabinet. A strengths, weaknesses, opportunities, and threats (SWOT) analysis is conducted periodically by SPRC and affiliated groups. Essential to the health of the strategic plan, a separate SWOT analysis is performed for each transformation. In addition, progress of the *Plan* is also measured by the accomplishments and challenges summarized in each divisional annual report submitted to the president. In effect, these annual reports explain how departmental and professional initiatives, accomplishments, and activities help to further at least one of the transformations in the *Plan for Excellence*. The current status of the *Plan for Excellence* is disseminated frequently in varied formats, as discussed in chapter 2.

In 2003, the Manager Performance Management and Development form (see the appendices) was revised to reflect organizational changes in the University, the president's and institution's allegiance to distributed leadership, and the *Plan for Excellence*. This tool gives both the manager and the manager's supervisor opportunity to devise professional objectives that further the mission of the University. Specifically, the manager's objectives are matched to one or more of the five transformations. Each manager is subsequently evaluated annually based on the achievement of those goals. Therefore, this system of employee evaluation measures the extent that managers are fostering the University mission and the *Plan for Excellence*.

The Presidential Initiative funding helps to align the budget process with the *Plan for Excellence*. An internal grant program, the Presidential Initiative funding helps support activities that advance the five transformations. The members of SPRC review the grant proposals, which are judged on the merit of how closely the activity or new program proposal supports one or more of the transformations. In addition, a grant proposal must stipulate how the program will be assessed, including the identification of measurable outcomes. Since its inception, $250,000 has been awarded to more than 25 academic departments and administrative units. Some examples of new programs that have been sponsored are listed below. The specific transformation that the initiative supports is shown in parentheses.

- Development of an Online Writing Laboratory (Student Success)

- Implementation of Alcohol and Drug Abuse Intervention Strategies (Student Success)

- Integration of Global Perspectives into the Curriculum (Diversity)

- Creation of a Link between the Writing Center and Area High Schools (Responsiveness)

- Assessment of Service Learning (Student Success)

- Establishment of the Co-curricular Portfolio (Student Success, Responsiveness)

- Launch of a Math Camp (Responsiveness, Resourcefulness)

In addition to the Presidential Initiative funding, all other new funding requests must be aligned with at least one of the five transformations. Reviewed by the Administrative Budget Committee (ABC), funding is granted to the extent that the request advances the *Plan for Excellence*.


## THE *PLAN FOR EXCELLENCE* AND STRATEGIC BUDGETING

West Chester University's strategic planning document, *A Plan for Excellence,* is the overarching framework for both strategic planning and budgetary decisions. Within this framework, the University uses a distributed leadership model and a large degree of decentralization in its budgeting. A salient feature of these approaches is that vice presidents, deans, and directors are responsible and accountable for managing the resources allocated to their areas. Complementing the distributed leadership and decentralization models are several committees that guide or assist in the planning and budgeting processes.

The Administrative Budget Committee (ABC) is the main recommending body to the president for the allocation, reallocation, or reduction of financial resources. The ABC also hears requests for funding from a variety of constituents and makes recommendations to the president on those requests. The recommendations of the ABC are guided primarily by the *Plan for Excellence*. One example is the multi-year plan for deferred maintenance and related needs, which the associate vice president for facilities presents annually to the ABC. Another example is the ABC's process for considering internal funding proposals that have campus-wide import. This proposal process began in fiscal year 2004-05 and has continued in fiscal year 2005-06. The specified criteria for evaluating these proposals and recommending new funding are as follows:

- Central to the University's mission and values

- Relates to the *Plan for Excellence* and one or more of the five transformations

- Demonstrates high quality or is very effective

- Provides a lasting benefit for the University

- Has value for the size of the investment

- Matches the institutional investment with other resources from the department or division

In anticipation of budget constraints within the next several years and to ensure that funds are available for key priorities, the ABC is currently evaluating possible areas for reduction or elimination. Again, the key criterion is how well a particular activity or function supports the *Plan for Excellence.* In addition, the ABC is examining possible means by which targeted services and administrative units could be delivered less expensively and more effectively.

The ABC is composed of the vice presidents, the executive deputy to the president, one academic dean, the University budget director, the academic affairs budget manager, and the director of fiscal affairs. Recommendations from the ABC are typically discussed at the President's Cabinet meetings and then acted on by the president. Supplementing the work of ABC are the University Budget Committee (UBC), SPRC, and the Enrollment Management Steering Committee (EMC).

The UBC, which is mandated by the APSCUF CBA, advises the president on the formulation of the University budget and on the development and implementation of University fiscal policies, both short-term and long-range. UBC membership represents each of the colleges, students, staff, and management. The committee's nonvoting members include the director of fiscal affairs, the budget director, the academic affairs budget manager, and representatives from the President's Cabinet. The specific functions of the UBC are to develop and recommend budget policy; recommend priorities and contingency plans within the capital, personnel, and operating budgets; review periodically the University's fiscal procedures and make recommendations for change when needed; monitor periodically the University budget; review the University's strategic planning documents and ascertain the budgetary impact of the recommendations in that document; and provide advice on budgetary matters as requested by the University president. The UBC is also responsible for undertaking special projects as requested by any of its constituencies.

To enhance communication and to ensure that the *Plan for Excellence* objectives are linked more directly with recruitment, retention, and enrollment planning functions, a new enrollment management process was developed in the fall of 2004. Integral to this process is the Enrollment Management Steering Committee. As discussed in chapter 4, the EMC has synchronized both policy making and implementation for the enrollment projections, recruitment, and retention initiatives. These enrollment projections and initiatives are then the basis for the budget projections for the five-year enrollment projection cycle.

The University also engages in an auxiliary fee process whereby strategic plans specific to the auxiliary operations are developed for a multi-year period. These plans then drive the

expenditure budgets, which in turn drive recommended revenue budgets. Generally, the revenue budgets are made up of mandatory student fees or fees for housing and food service. Two examples of the link between planning and budgeting relate to the residence halls. All student housing areas were retrofitted with sprinkler systems and with the Local Area Network (LAN). Both these projects were funded through bonds issued by PASSHE. Because of the significant debt service requirements, both the sprinkler system and the LAN became major components of the short- and long-range budget planning for the auxiliary operations.

Renovating or replacing the current student housing units that were built 40 years ago or earlier is presently under discussion. In 2002, the University entered into a partnership with its foundation, the Fund for West Chester University, to develop, design, construct, and operate two new housing facilities with a total capacity of 788 students. This privatization is being considered as a possible future model for student housing, although replacement of some University housing stock with the "privatized" stock owned and operated through the Fund for West Chester University could have a significant impact on the financial viability of the remaining University housing. Representatives from various constituent groups are currently discussing possible courses of action and their ramifications. The expected result is a master plan for student housing, which would become a subset of the Comprehensive Facilities Plan and be integrated into the enrollment projections initiatives.

## OTHER CAMPUS PLANS

Because of the size and breadth of West Chester University, several campus plans have been developed in parallel with the *Plan for Excellence*. Ancillary to the *Plan for Excellence*, these campus plans address specific internal operations and external circumstances relevant to that specific planning area. These campus plans further reinforce the implementation of the *Plan* by providing definitive objectives and concrete action plans. Discussed briefly below are the following campus plans:

- Comprehensive Facilities Plan
- Technology Implementation Plan
- Library Strategic Plan
- Enrollment Projections Plan
- Marketing Plan
- Social Equity Affirmative Action Plan

### Comprehensive Facilities Plan

As mentioned, the Comprehensive Facilities Plan, developed in 2000, provides the framework for major construction and renovation efforts. (A copy of the Comprehensive Facilities Plan is shown in the appendices.) Reflecting the need for the Comprehensive Facilities Plan to be flexible and dynamic, the plan is evaluated and fine-tuned on an annual basis to address changing priorities and opportunities. The Comprehensive Facilities Plan and the annual refinements to that plan form the bases for the University's capital budget request, which is

submitted to the PASSHE Board of Governors. Current and projected needs for several space categories were incorporated into the Comprehensive Facilities Plan.

In 2000, the following facility areas were extensively surveyed: campus electrical and telecom capacities, utilities, building systems, building lifecycle and deferred maintenance schedules, technology capability, and security issues. Current and future needs were identified based on the results of these surveys as well as on both projected enrollment growth and the *Plan for Excellence*. As a result, four new facility projects were recommended in the Comprehensive Facilities Plan. Also considered in the facilities plan were the need for additional residential capacity, parking, and pedestrian walkways. Aligned with revenue projections and also accommodating the Borough of West Chester and surrounding community partnerships, minimal land acquisition was proposed. Additionally, several design standards accompanied the Comprehensive Facilities Plan. Again, these standards are intended to align future construction, landscaping, and maintenance with projected enrollment growth and the *Plan for Excellence*.

To make the Comprehensive Facilities Plan more accessible, an executive summary of the plan is posted on the University's Web site at http://wcupa.edu/_information/afa/Facilities/ExecSumm.htm. In fall 2005, a report on the status of the plan was presented to the Council of Trustees. Incorporated in the status report were historical enrollment information and the rationalization for both completed and unfinished facility projects outlined in the 2000 plan.

**Technology Implementation Plan**

The *Plan for Excellence*, the PASSHE strategic goals, and the Comprehensive Facilities Plan guided the Technology Workforce Group in the development of the Technology Implementation Plan. As with the Comprehensive Facilities Plan, the Technology Implementation Plan is aligned with the University mission and *A Plan for Excellence*. The technology plan identifies several priorities and long-term objectives accompanied by specific key strategies to accomplish those objectives. Progress made toward the plan's objectives is assessed annually. The Technology Implementation Plan has resulted in an upgrade in network security, wireless access campus-wide, and expanded e-mail access for every student and staff member. A copy of the Technology Implementation Plan is included in the appendices.

**Library Strategic Plan**

The Library Strategic Plan was adopted in spring 2005. Again, the Library has aligned its objectives with the five transformations in the *Plan for Excellence*. Built into the Library Strategic Plan is an assessment plan and timeline for assessment. The assessment cycle includes both the evaluation of library services and the evaluation of student and staff information literacy skills. A copy of the Library Strategic Plan is available in the appendices.

**Enrollment Projections Plan**

The Enrollment Projections Plan (see the appendices) is central to the realization of the *Plan for Excellence*. As discussed in chapter 4, the Enrollment Management Steering Committee (EMC) sought to bring together the efforts of the Retention Committee, Marketing Committee, and newly formed Enrollment Projections Committee. The purpose of this integration is to effectuate an enrollment management structure that will deliver responsive, agile, and

streamlined enrollment services. Accordingly, the EMC was charged with devising an enrollment management plan. The result is a comprehensive Enrollment Projections Plan replete with several enrollment-service and academic-department initiatives. At the heart of the Enrollment Projections Plan is a focus on students' success for the entire duration of their academic career. Additionally, West Chester University put in place several enrollment indicators that will discern the University's ability to be proactive in relation to current marketing and enrollment trends. The Enrollment Projections Plan has been shared with several campus constituencies.

**Marketing Plan**

The first iteration of the Marketing Plan was delivered in 2001. As an evolving document that is reviewed annually and modified accordingly to meet the needs of an ever-changing environment, the Marketing Plan sets a framework that encompasses the new enrollment management structure, the WCU Diversity Transformation and PASSHE diversity strategic goals, the enrollment projections, and the rapidity of regional workforce and economic changes. Also addressed are the marketing of specific programs and target demographic groups aligned with the PASSHE diversity goals and regional workforce needs. The Marketing Plan is included in the appendices.

**Social Equity Affirmative Action Plan**

The Social Equity Affirmative Action Plan is one of many avenues through which West Chester University affirms its commitment to offering equal employment opportunities regardless of race, gender, religion, national origin, age, marital status, sexual orientation, disability, or veteran status. The Social Equity Affirmative Action Plan (in the appendices) guides the University in the recruitment, retention, promotion, training, and terms of appointment of all individuals. As part of the plan, an annual analysis is conducted to determine the availability of several equity groups, such as female and minority groups. This availability index is compared to the University's staffing demographics at the departmental level. Departments with a percentage of staff belonging to a particular equity group below the availability indices are encouraged to develop plans to improve recruitment of those underrepresented groups.

# Conclusion

*A Plan for Excellence* has been integrated into all divisions of the University with annual monitoring by SPRC and the President's Cabinet. As this report has shown, the *Plan*, in combination with the president's distributed leadership philosophy, has guided the University well in an era of diminishing state support and increased demands for accountability. In the past five years, the University has become more agile, responsive, efficient, and entrepreneurial, while increasing academic access and excellence, service to the community, and student success. West Chester University is well positioned to continue to thrive in the future and to achieve recognition as a national model for public regional comprehensive institutions.

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    Division of Academic Affairs, Office of Sponsored Research and Faculty Development, Annual Report, July 1, 2004 – May 31, 2005

    Office of Sponsored Research and Faculty Development, West Chester University

    Research Day, Thursday, March 30, 2006, Program

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# Selected West Chester University Web Sites

Academic Computing: http://www.wcupa.edu/infoservices/AcademicComputing/

Academic Policies: http://www.wcupa.edu/_admin/associateprovost/policies_procedures.html

Academic Programs and Degrees:
http://www.wcupa.edu/_ADMISSIONS/SCH_ADM/MAJORS.HTM

Admissions: http://www.wcupa.edu/toplevel/admissions.asp

AFSCME CBA: http://www.passhe.edu/content/?/administration/HR/labor/unions/afscme

APSCUF (Faculty) CBA:
http://www.passhe.edu/content/?/administration/HR/labor/unions/apscuf

CAPC: http://www.wcupa.edu/_admin/associateprovost/capc.html

CAPC Program Review Committee: http://www.webcourse.com/CAPC/

Campus Map: http://www.wcupa.edu/_information/afa/Facilities/CampusMaps/

Campus News and Events: http://www.wcupa.edu/_INFORMATION/events/

Catalogs, Graduate and Undergraduate:
http://www.wcupa.edu/_INFORMATION/OFFICIAL.DOCUMENTS/

Faculty Senate: http://www.wcupa.edu/_facstaff/FacultySenate/default.htm

Frederick Douglass Institute: http://www.wcupa.edu/_academics/fdouglass/

Graduate Studies: http://www.wcupa.edu/_ADMISSIONS/SCH_DGR/

Institutional Research: http://orp.wcupa.edu/

Library Resources: http://www.wcupa.edu/library.fhg/default.htm

Menu of Current Student Web Sites: http://www.wcupa.edu/_STUDENTS/

Menu of Faculty/Staff Web Sites: http://www.wcupa.edu/_facstaff/

Pennsylvania State System of Higher Education: http://www.passhe.edu/

Pennsylvania State System of Higher Education Board of Governors Policy 2000-02: Capital
Facilities Planning, Programming, and Funding:
http://www.passhe.edu/content/?item=1376

Research Consortium: http://www.wcupa.edu/wcurc/

Self-study and *Plan for Excellence*: http://www.wcupa.edu/selfstudy/

Service Learning and Volunteer Programs: http://www.wcupa.edu/_services/stu.slv/

Sponsored Research and Faculty Development: http://www.wcupa.edu/_facstaff/facdev/

Strategic Planning Resource Council: http://www.wcupa.edu/sp/wn_ss.html

Student Affairs: http://www.wcupa.edu/_SERVICES/stu/

Student Handbook (*Ram's Eye View*):
http://www.wcupa.edu/_INFORMATION/OFFICIAL.DOCUMENTS/ramseye/

Training and Development (Human Resources): http://www.wcupa.edu/hr/training