The Gold Standard 2020
2017-18 Executive Summary

WMU continues to strive for excellence in its commitment to be learner-centered, discovery-driven, and globally engaged. The Gold Standard 2020, now completing the second year of implementation, is structured to support five aspirational goals, 24 measureable objectives, and 108 strategies — 44 of which have been prioritized for the first two years of implementation. In October of 2017, newly appointed president, Edward Montgomery, provided the campus with a renewed focus on three overarching priorities of the strategic plan that would allow WMU to react to emerging challenges and put the university on a new higher future trajectory. President Montgomery encouraged the campus community to see their strategic planning in a renewed focus that would have significant impact on Student Success, Diversifying Revenue, and becoming a School of Choice. Six metrics were identified to measure progress on these three areas: increase alumni giving rate; increase six-year graduation rate; increase first-year retention rate; improve high school counselor assessments of WMU; raise entering student GPA; and, increase/maximize research expenditures. Additionally, the president announced the creation of the WMU Transformational Initiatives Fund of $1M available for collaborative initiatives aimed at transformational work that would significantly impact one or more of the three transformational priorities. Strategic plan reporting supported this enhanced prioritization by restructuring the mid-year and year-end reporting in alignment with the three transformational priorities and six super priority metrics.

Fiscal year 2018 was the second year of utilizing Collaborative Risk and Opportunity Management (CRŌM) as part of the strategic plan implementation process. The Strategic Management Executive Council (Council) met on a monthly basis to identify and address enterprise-wide risks and opportunities generated from previous year risk and opportunity identification and analysis. The Council identified mitigation plans for 20 primary and 33 secondary risks identified as critical through the enterprise-wide risk categories of Organization Culture, Resource Deployment, and Strategic Prioritization. CRŌM Action Teams continued to develop actions to mitigate 168 risks across seven risk categories, and participated in an environmental scanning of risks in preparation for the comprehensive visit of the Higher Learning Commission in 2020-21. One CRŌM Risk Team, Student Success, were integrated into the newly formed Retention Action Team, developed by Enrollment Management.

Shared Gold is another key planning initiative in support of The Gold Standard 2020 launched in fall 2017. The Shared Gold Civic Action Plan targets engagement, responsibility, and prosperity to support and encourage the university in building strategic community health, wealth, educational, and cultural networks. The
development and implementation of the plan directly supports Strategy 3.3a of The Gold Standard 2020; yet, the plan’s four major goal areas and 14 objectives further support other areas of the university plan. The success of Shared Gold will also support the reclassification of WMU as a Carnegie Community Engaged Campus.

In an effort to streamline strategic plan reporting efforts, the university invested in a campus-wide implementation of Planning, a Campus Labs online strategic planning reporting module. During spring 2018, a total of 21 representatives from all university divisions completed group or individualized training in using the Planning module to report 2017-18 end-of-year strategic planning. Ongoing efforts to build standardized templates will provide greater efficiencies in analysis and reporting.

Accountability to The Gold Standard 2020 is based on the composite reporting of progress measures for priority strategies from all of the university vice-presidential divisions, and 67 key performance metrics (disaggregated to 93) across the 24 objectives. Five years of data, and the most recent Carnegie peer average data, are used to establish trends to measure progress toward achievement of goals by 2020. New to the 2017-18 report is the analysis of new or reappropriated strategic allocation of resources in support of priority initiatives.

University vice-presidential divisions submitted progress measures for 120 division-level responses across 44 university priority strategies. Most significant efforts were reported in the areas of Student Success with 28 initiatives attempting to impact second-year retention (n=8), degree completion (n=11), and focusing on student engagement/inclusive excellence (n=9). In Diversifying Revenue, a total of 45 initiatives addressed increasing research expenditures (n=11), alumni Giving (n=8), Increasing financial stability (n=15) and enrollment management (n=11). Efforts to make WMU a School of Choice reported 52 initiatives that focused on Campus Climate (n=19), Safety (n=3), Employee wellbeing (n=6), freshmen profile/academic excellence (n=18), Facilities (n=4) and high school counselor rating/community engagement (n=2).

President Montgomery’s transformational initiatives and identification of transformational priorities provided a much needed focus for the large and comprehensive strategic plan. Ongoing attention to the development of lead metrics, focus and ownership of specific strategic objectives by key leadership positions, and development of measurable and timely reporting of annual benchmarks are key to the continued success of The Gold Standard 2020.

Invest in Gold Final Report 2017-18
Gold Standard Annual Report 2017-18 — Page 3
Goal 1

Ensure a distinct and supportive learning experience that fosters success.

1.1b: Develop advising and retention efforts appropriate to the needs of sophomore, junior, and transfer students.

The Division of Academic Affairs reports 21 new articulation agreements were created in 2017-18. A total of 51 agreements now exist that diagram the efficient transfer of classes to WMU programs. Agreements with Kellogg Community College, Glen Oaks Community College, and Kalamazoo Valley Community College ensure smooth transitions for significant student transfer populations.

1.1c: Improve support programming to help students with varying levels of academic preparation.

Intercollegiate Athletics continued mandatory semester academic advising of all student athletes; increased funding for academic services and tutoring, including extended hours of Study Table; improved technology; and, enhanced part-time writing and math specialist, nutritional and mental health programming, and internships for female and minority students. All teams achieved a multi-year academic progress rate (APR) in excess of target goal of 950.

The Office of Diversity and Inclusion centralized diversity education programming to reduce redundancies and increased rate of participation. The director for diversity education will be responsible for the assessment of learning.

Success at WMU, a peer mentoring program that will serve all first-year and new transfer students beginning in fall 2018, is one of the Presidential Transformational Initiatives that demonstrates campus commitment to student success.

1.2b: Enhance career preparation services and provide more opportunities for professional development to boost post-graduation success.

The Office of Community Outreach launched the Campus Compact Civic Action Plan as part of Shared Gold. Shared Gold targets strategies to increase awareness of experiential learning, volunteer opportunities, and internships.

Career and Student Employment Services, in the Division of Student Affairs, collaborated with 24 sections of First-Year Seminar (FYS) to incorporate the Gallup’s Clifton StrengthsQuest into the curriculum. Seven job fairs spanning multiple industries and job functions were sponsored by Career and Employment Services; total attendance at job fairs was 3,345 students.

1.2d: Promote greater involvement of undergraduate and graduate students in research and creative activities.

The Office of the Vice President for Research developed a new website and resources for undergraduates. A revised internal grant program to support undergraduate research will launch in FY 2019. A new program promoted undergraduate research at orientation events. OVPR also revised a program for covering out-of-state tuition for graduate students participating in faculty research grants ($130,000).

The Office of Community Outreach established the Downtown Neighborhood Memorandum of Understanding (MOU). The partnership resulted in extensive survey and observational research conducted by students being put into practice by Downtown Kalamazoo Incorporated.

Additional locations supported by Extended University Programs (EUP), in the Division of Academic Affairs, are contributing to undergraduate and graduate research. The Grand Rapids location offerings in social work and occupational therapy have expanded graduate student involvement in research, experiential learning, and service-learning through the Clark Living Community
program. EUP’s presence in Florida has facilitated local research contracts on algal blooms and septic conversions that are employing multiple graduate students. There is continued growth of the Traverse City Freshwater Science and Sustainability program engaging undergraduate students in multiple community-based research and creative activity programs.

1.3a: Develop and implement the Signature Designation to support student engagement and distinction.

Budget protocol funds of $131,000, along with committed funding of $61,219 from the Offices of the Vice Presidents for Academic Affairs and Student Affairs, supported the launch of the WMU Signature (a.k.a. the Signature designation). This Quality Initiative, required by the Higher Learning Commission, had 8,995 students attend at least one of 375 Signature designated events. A total of 21 students graduated during AY 2017-18 with a WMU Signature, and another 104 students have declared a Signature Pathway. All newly enrolled students are automatically entered into the Signature portal, Experience WMU.

1.3b: Continue implementation and development of programming to increase student financial literacy.

A Shared Gold (Office of Community Outreach) high-impact network, involving the Kalamazoo Education and Employment Promise (KEEP) Network, the newly created Sanford Center for Financial Planning, the Office of Student Financial Aid, and the Office of Pre-College Programming, launched a series of web-based financial literacy modules, along with other financial wellness activities. Established in August 2016, the Financial Literacy, Educational Planning, and Outreach [FLEPO] unit, in the Office of Financial Aid (Division of Academic Affairs), provides students with information about building a financially stable future including financing their education, knowledge and understanding about student loans, debt and repayment, credit basics, budgeting, saving, and investing. During the AY 2017-18, FLEPO hosted 120 workshops and presentations, and served over 1100 students.

1.4a: Increase feasibility of broad-based participation in study abroad programs and other globally focused learning opportunities.

The Office of Study Abroad, in the Haenicke Institute for Global Education (HIGE), in the Division of Academic Affairs, provides to every student who studies abroad a $110 “passport scholarship” that can be used to cover the cost of obtaining a passport or to defray the program fee. Revision of the HIGE Study Abroad Scholarship structures, previously merit- and need-based, is now exclusively need-based to expand the number of recipients. In addition, the Office of Study Abroad applied for and received a grant from the Council on International Educational Exchange (CIEE) that will allow 100 students from the Alpha Program, College Assistance Migrant Program (CAMP), Foundation Scholars, Martin Luther King Scholars Academy, and Seita Scholars to receive a free passport as part of CIEE’s “Passport Caravan” program.

1.4c: Provide enhanced living-learning support for the growing number of international students at WMU.

The Division of Student Affairs and the Haenicke Institute for Global Education (HIGE), in the Division of Academic Affairs, worked together to implement several strategies to support international students. Student Affairs invested $250,000 to create a kitchen for the Global Learning Community. Additionally, 34 of 47 possible bed spaces have been filled for the Global
1.5d: **Reinforce campus safety through informed modification in university policies and physical environment.**

On March 14, 2018, WMU formally approved the Western Michigan University Policy Development Policy; a set of standards developed by a campus taskforce that are designed to formalize and govern the way university policies are developed, reviewed, and shared with the campus community. The University Policy webpage is being redesigned to more accurately display existing university policies, and includes information on the University Policy Committee and official policy development templates.

The Department of Public Safety, (Office of Business and Finance), reported that WMU was recognized as the No. 3 university in the nation for its campus safety initiatives. Specific initiatives included newly created Facebook and Twitter pages to disseminate vital information concerning off-campus incidents to students, parents, and the campus community; contracting with a threat assessment company to monitor numerous social media sites for harmful or threatening information concerning the campus, students, or the university community; response to mental health issues; and, a focus on community outreach in student neighborhoods.

WMU’s Planning and Construction Design team (Office of Business and Finance) worked with the City of Kalamazoo and the Michigan Department of Transportation (MDOT) to redesign both vehicular and pedestrian traffic in one of the busiest intersections adjacent to campus. The agreed upon design includes better marked pedestrian crosswalks and medians; a relocated bus stop; broader traffic lanes including an additional turn lane; and, the construction of a sidewalk along the road where one currently does not exist. Construction will occur in 2019.

Five area Public Safety Answering Points (PSAPs) (including WMU) have joined to create a consolidated central dispatch authority. Previously, WMU public safety handles all after hour calls, monitored fire and building alarms, panic buttons, and directly picked up 911 calls. Throughout the 2017-18 year, the police and facilities restructured the dispatch operation so that elevator and fire alarms are routed to vendor call centers, and all mechanical building alarms, panic buttons, and non-911 emergency calls are routed to the facilities call center.
The Little Theatre on Western Michigan University’s East Campus has been selected as the site that will be home to the Presidential transformational initiative Esports@WMU, set to launch in fall 2018. This pilot effort will extend the community-building effort to students’ recreational hours, with WMU becoming one of a relatively small number of colleges and universities nationwide to formally sponsor video gaming. The gaming facility will be an area in which students can compete and spectators have a comfortable place to watch community video gaming events.

The Division of Student Affairs has significant ongoing facilities projects. Core projects include the new Student Center, Dining Facilities, and the South Neighborhood project. Building and infrastructure-deferred maintenance needs are identified and prioritized by Facilities Management (Office of Business and Finance) and the Student Affairs Integrated Planning and Budgeting team; they review and recommend top priorities to the vice president for student affairs, with a focus on recruitment and retention. Nearly $2M in projects were approved during FY 2018.

University Recreation, in the Division of Student Affairs, opened the sixth F45 studio on a college campus (the first in Michigan), selling over 100 memberships to students, faculty, and staff. On average, there are 200 weekly attendees at F45 classes, with an overall increase of 32 percent in class participation from fall 2016 to fall 2017.

The Division of Academic Affairs completed a redesign of space, within Waldo Library, to be an informal meeting space for graduate students called the “Graduate Student Commons” for interaction and study. A virtual reality lab was opened in the Waldo Library, this past year, and a new maker space is ready to start offering services at the start of fall 2018.

Eight of 16 teams, in Intercollegiate Athletics, finished in the top half of conference standings with two teams, (i.e., Men’s Soccer, Men’s Tennis) winning the Conference Regular Season. Men’s Tennis also won the conference tournament.
Goal 2
Promote innovative learning, discovery, and service.

2.1b: Revise general education curricula to respond to the needs of the 21st century student.

The office of Assessment and Undergraduate Studies, in Academic Affairs, worked with the Faculty Senate on the implementation of WMU Essential Studies. Four main accomplishments included Memorandum of Agreement 18/01 Essential Studies Learning Outcome Amendments, Memorandum of Agreement 18/02 Essential Studies Course Approval Guidelines, Memorandum of Agreement 18/03 Essential Studies Student Requirements, and faculty development of an assessment rubric for each WMU Essential Studies learning outcome.

2.2a: Promote academic excellence and innovative discovery through strategic investment in personnel.

Academic Year 2017-18 was one of significant administrative transition. WMU welcomed Dr. Edward Montgomery as its ninth president. WMU also conducted successful national searches for a new vice president for research, provost and vice president for academic affairs, vice president for diversity and inclusion, and vice president for marketing and communication. The Haworth College of Business and the College of Health and Human Services also completed national searches for their new deans.

2.2d: Develop operational succession plan for faculty, staff, and administrators.

The provost and vice president for academic affairs provided $10,000 to two college deans to attend the Harvard Institute for Educational Management. In addition, the provost requested one-, three-, and five-year hiring plans from all units to identify academic and scholarly priorities and synergies. Analysis will be conducted to look for overlap and possible cluster-hiring strategies.

2.3d: Incorporate early-alert technology and holistic advising to support student success.

Academic Affairs, in support of the Western Student Association (WSA) Memorandum of Understanding on Submission of Mid-Term Grades utilized an engagement trophy initiative and increased communication to raise mid-term grade submission from 28 percent (spring 2017) to 34 percent (spring 2018).

2.3e: Advocate for proposed capital outlay projects, such as the College of Aviation expansion.

The Office of the Vice President for Research supported an Association of Public and Land-Grant Universities Council on Research (APLU CoR) Fellowship application and Society of Research Administrators International (SRA) certification.
The Office of Government Affairs was successful in gaining a state appropriation for the renovation and expansion of the College of Aviation in Battle Creek. The office is currently working jointly with the City of Battle Creek to resolve some regulatory issues with the Federal Aviation Administration prior to beginning construction. The university’s next priority for state capital funding is the renovation of Dunbar Hall.

The Office of Government Affairs successfully advocated for special funding, earmarked in the FY 2019 state budget, for Unified Clinics ($1.5M), the Seita Scholars program ($500,000), and the Geological Survey ($500,000).

2.4a: Develop appropriate financial support strategies to assist graduate students.

The Division of Academic Affairs redistributed $509,632 to colleges to fund 71 research assistants.

2.4b: Improve data systems to monitor, review, and assess graduate student success.

The Graduate College, in the Division of Academic Affairs, transferred to a new application system for Graduate College grants and fellowships, which will better track data on recipients. A formal evaluation of Graduate College assessment practices will provide useful information about how to better assess programming.

2.5a: Expand and optimize WMU’s recruitment and delivery of educational opportunities to new, targeted demographics and strategic geographic regions.

Extended University Programs, in the Division of Academic Affairs, expanded dual enrollment offerings through the establishment of Collegiate Pathways, increasing dual enrollment from zero to 100 students.

Western Michigan University has been authorized to add seven new degree and certificate programs, in a range of disciplines, to students studying at its Punta Gorda, Florida regional location through Extended University Programs (Division of Academic Affairs). The new programs approved are in the specialty areas of engineering management, integrated supply chain management, and music therapy. These programs join the Bachelor of Science in Aviation Flight Science, which has been offered at WMU-Punta Gorda since fall 2017.

Division of Academic Affairs pioneered configuration of six new certificate programs to begin fall 2018, bringing total to 38. In 2017-18, 72 certificates were awarded.

Academic Affairs launched and supported the early-middle college/pre-college initiative allowing high school students to access mutually beneficial and cost-effective WMU programs. A total of 34,827 youth were served through pre-college outreach efforts through a total of 278 pre-college outreach programs registered with the Office of Pre-College Programming.

2.5b: Implement a comprehensive enrollment management plan to maximize program capacity and achieve academic program goals.

The Retention Action Team (RAT), with representatives from the Division of Academic Affairs, Office of Business and Finance, and Division of Students Affairs, was established through Academic Affairs’ Enrollment
Management office. A considerable amount of time was spent on accumulating and reviewing retention data. Significant recommendations included raising average credit hour schedule for FTIAC to 15.

For the 2018-2019 academic year the Office of Student Financial Aid (SFA) in Academic Affairs began the implementation and utilization of the Academic Works Scholarship Management platform to award endowed scholarships. With the tool, SFA was able to create an online scholarship application site, the BRONCO gold mine, which resulted in an 83% increase in scholarship applications. The use of the system will be expended to other University departments for the 2019-2020 academic year.

Enrollment Management implemented 25Live, a room scheduling software. All academic schedule builders received training which will improve academic department’s access to view information and develop custom reports.

A collaborative effort across a number of WMU divisions worked to have the academic calendar changed to improve student transition into classes before Labor Day and provide for a Fall Semester break.

2.6a: Develop efficient mechanisms to gather and distribute faculty, staff, and student scholarship and discovery data.

WMU implemented Faculty 180 from Interfolio, a software system designed to enable faculty to organize, manage, and report on their annual professional activities as well as to manage their curriculum vitae and biographies in multiples forms.

The Office of Vice President for Research, in collaboration with Grants and Contracts and the Office of Institutional Research (Academic Affairs), reviewed The Gold Standard 2020 research metrics for efficient data collection and enhanced analysis of key facts used by the strategic plan. Updates to the Faculty Activity Reporting System (FARS) are underway to include the intellectual split so that Co-PIs and their departments and colleges will be able to get credit for a portion of the award in the reports.

2.6c: Strategically align staff and faculty expertise and strengths with available resources at the unit level to promote learning and discovery.

The College of Arts and Sciences, in the Division of Academic Affairs, created opportunities for collaborative teaching through the college’s Innovation Cluster; departments working together to build new programs that will enhance opportunities for teaching and research in high-demand areas.

The College of Education and Human Development, in the Division of Academic Affairs, allocated $50,000 for the creation of five Centers of Excellence; partnerships between faculty members resulted in the development of six grant proposals that are estimated to be submitted in 2020.
3.1b: Support implementation and accountability of discovery communities to increase both the aggregate and per-capita level of research activity supportive of a Carnegie-classified Doctoral University: Higher Research Activity.

The Office of the Vice President for Research implemented the Spring Convocation Focus Symposia on Autism and Mobility, which increased faculty and attendees awareness of funding opportunities and types of research being conducted at WMU. Grant Forward was made available to faculty to offer more opportunity to search for funding opportunities.

The WMU Lewis Walker Institute for the Study of Race and Ethnic Relations, in the Division of Academic Affairs, and the City of Kalamazoo held an informational meeting to learn about the city’s new Shared Prosperity Kalamazoo (SPK) campaign. The event focused on how faculty and student involvement, in this exciting and potentially transformative initiative, can be both good for the city and the university. Progress toward achieving any of the goals of Shared Prosperity Kalamazoo requires that the Kalamazoo community develop and implement a campaign that prioritizes their goals in the policies and practices of collaborating SPK partners, and build on the extensive work already being done by existing organizations and programs to accomplish these goals. Success also requires the use of evidence-based strategies that are attuned to the strengths and needs of the community, setting clear and measurable goals, and tracking progress toward achieving those goals.

3.1e: Enhance information technology and knowledge transfer in partnership with WMU spin-off companies, industry, and community.

The Office of Information Technology, in the Division of Academic Affairs, is contributing to the new version of the Research Project Approval Form, in order to identify potential costs, resource needs, and security and compliance issues prior to a project being approved. In addition, OIT has added content on resource information for researchers to the OIT website. In addition, OIT is jointly reviving the research High Performance Computing group, with the Office of the Vice President for Research, to identify common needs for high-performance research computing on campus. The effort should result in a new funding proposal for computing infrastructure or hybrid cloud resources to support research computing at WMU.

3.2b: Actively support technology and knowledge transfer in partnership with WMU spin-off companies, industry, and community.

The Office of Community Outreach applied for and received a $2.5M grant from the United States Economic Development Administration to help fund the infrastructure costs for BTR 2.0, the WMU Business Technology and Research Park's phase II development. Funds will be used primarily for roads and utilities.

WMU teamed up with the City of Kalamazoo, the Local Initiatives Support Corporation (LISC), and other key partners to develop a mixed-use business incubator in Kalamazoo. To-date, the Office of Community Outreach, The Western Michigan University Homer Stryker M.D. School of Medicine Innovation Center (located in the WMU Business Technology and Research Park), as well as the Small Business Development Center and WMU Starting Gate (both hosted by the Haworth College of Business in the Division of Academic Affairs) have signed on to be...
resources for the proposed Kalamazoo mixed-use business incubator. Faculty from the WMU Haworth College of Business have already published research on the project.

**3.2c: Develop curricular programs that will contribute to incumbent and future workforce needs.**

A number of initiatives in the Division of Academic Affairs are meeting workforce needs. The AMP LAB initiative at WMU-Grand Rapids (Downtown) supports training to address critical shortages in engineering technology and manufacturing. A partnership with Aquinas College will help expand the number of industrial and civil engineers in the Grand Rapids area. Shifting the RN-BSN program to fully online maximizes the potential market to address local, state, and national nursing shortages. New graduate certificates, master’s programs, and non-credit offerings in Information Security are providing training at multiple levels in this high-need area.

The Office of Community Outreach allocated $20,000 in conjunction with $94,000 from the Local Initiative Support Corporation (LISC) and the City of Kalamazoo to expand the Small Business Development Center (SBDC) at WMU. The funding will be used over a two-year period to cover a portion of the payroll for a SBDC Business Consultant to provide one-on-one business consulting, training, and secondary research to those considering starting a new business venture, and to those that are currently in small business looking to grow and expand their businesses. SBDC is a critical resource for WMU Starting Gate, home to WMU student start-up companies.

**3.3a: Develop and implement a renewed Campus Compact Action Plan, dedicating the university to work with other institutions to advance the public purposes of higher education.**

The Office of Community Outreach has helped launch the WMU Shared Gold Civic Action Plan, a commitment to the National Campus Compact 30th Anniversary Action Statement of Presidents and Chancellors. The plan was created through an iterative process of community partners, students, faculty, and staff that aims to better foster civic engagement, social responsibility, and shared prosperity in the community. The plan’s four major goal areas and 14 objectives will help the university meet the commitment of reinvigorating higher education for the public good, and lead the university to reaffirmation of the Community Engagement Classification from the Carnegie Foundation.

**3.3f: Assist all students with developing meaningful connections in their local and global communities.**

The Office of Community Outreach executed several strategies of the Shared Gold plan that resulted in a Memorandum of Understanding with Downtown Kalamazoo Incorporated, Shared Prosperity Kalamazoo, and the City of Kalamazoo’s Arcadia neighborhood all that resulted in student engagement with community stakeholders. Celebration of Earth Day in downtown Bronson Park, development of the Oak Street Community Garden, promotion of sustainability along Davis Street in Kalamazoo’s Vine Neighborhood are a few examples. The Shared Gold plan also laid the foundation for a partnership between WMU and Truth, Racial Healing, and Transformation Kalamazoo. The initial arrangement is for WMU to participate in research and to offer a 2019 course that will involve students in the support of this national initiative collaborated by the Kalamazoo Community foundation.
Goal 4

Promote a diverse, equitable, and inclusive university culture to ensure social sustainability and accessibility.

4.1c: Ensure viable, safe avenues to report instances of inequitable behavior.

The Office of the General Counsel has initiated the development of a compliance committee focused on establishing a system for evaluating compliance and communicating compliance requirements across campus.

The Division of Academic Affairs required all search committees and administrators to complete the EverFi online training. To-date, 584 individuals completed Workplace Violence Prevention, 520 individuals completed Bullying in the Workplace, 427 individuals completed Harassment and Discrimination Prevention.

The new Student Complaint Tracking Policy, approved by President Montgomery, requires all vice-presidential divisions to report annually the number, type, response, and time-to-response for officially reported student complaints. The tracking process also provides evidence that student complaint processes are well distributed, and units are using annual review of complaints for quality improvement.

4.2a: Understand and work to remove systemic institutional barriers for recruitment, retention, and degree completion of students from historically underrepresented groups in higher education.

The Division of Student Affairs allocated $10,631 to support diversity and inclusion initiatives that included funding for group events, educational webinars, and leadership conferences. In addition, the Office of Student Engagement is broadening the Student Organization Annual Retreat, intentionally reaching out to and including diverse student groups.

The Office of Finance and Infrastructure, in the Division of Student Affairs, developed standard language for incorporation into WMU Request for Proposals and Request for Quotations documents, for Student Affairs capital projects, requiring architecture and engineering (AE) firms to have experience using inclusive design practices. This advancement resulted in the first-ever project proposals by AE firms to have a diversity consultant on the team.

In collaboration with Fall Welcome, the Office of Student Engagement in the Division of Student Affairs hosted “Walks of Life” for over 1400 first-year students. The activity will be continued in August 2018.

4.3c: Promote human resource practices and programming that meet the needs of WMU employees to enhance workplace engagement.

To fulfill their mission and contribute to the university goal of academic excellence, the Administrative Professional Association (APA) and the Professional Support Staff Organization (PSSO) collaborated on the development of an employee engagement and satisfaction survey open to all benefits-eligible non-bargaining staff members governed by the Staff Compensation System. Survey results have helped shaped advocacy efforts focused on employment engagement and morale.

4.3d: Implement changes in student service facilities that create a barrier-free, welcoming environment for a diverse population.

The Office of General Counsel, in collaboration with the Office for Diversity and Inclusion, is drafting policies for university dissemination of the Americans with Disabilities Act of 1990 (ADA) and the Federal Housing Administration (FHA) requirements with regard to accessibility.

The university’s Web Accessibility Policy was developed by the Office of General Counsel and approved by Board of Trustees at their September 20, 2017 meeting. The purpose of the policy is to facilitate and verify that information provided through the university’s websites (a.k.a., “online content”) is accessible to current
students, prospective students, employees, guests, and visitors with disabilities, particularly those with visual, hearing, or manual impairments, or who otherwise require the use of assistive technology to access information.

4.4b: Identify and appropriately resource staffing levels in critical areas to support quality learner-centered service.

The Division of Student Affairs added an additional staff member to support the increased demand in the Office of Student Conduct, reducing case creation to adjudication an average of five days faster. One-time dollars were allocated to hire additional counseling staff during peak periods in order to better meet student needs. In addition, adjusted schedules and backup intake/crisis appointment hours, during highly utilized times of the day, reduced the waitlist by approximately 80 percent, and decreased the number of students that left without being seen on intake/crisis from 73 to 33.

Second-year retention increased by more than two percent as a result of the Division of Academic Affairs’ focus on retention for 2017-18. The division distributed $199,229 to colleges for retention efforts such as hiring retention coordinators and additional academic advisors, peer coaching for first-year students, and the development of an Office of Student Success and Retention.

4.4c: Offer and encourage participation in professional skills training to increase employee retention, advancement, and workplace satisfaction.

The Office of Community Outreach sponsored three individuals to attend the National Campus Compact Conference and the Fifth International Global Service-Learning Summit. Attendees will provide new ideas and strategies to support WMU’s civic engagement activities.

University Relations, in the Office of Government Affairs, trained a total of 89 individuals, during AY 2017-18, and 153 individuals for the calendar year, as Brand Ambassadors through the Behind the W program.

The Division of Student Affairs sponsored eight staff members to participate in Clifton StrengthsQuest training, conducted by Gallop. All full-time staff and graduate assistants, in Career and Student Employment Services, received their 34 strengths reports, and participated in one-on-one interpretation of the findings.
**Goal 5**

**Advance economic and environmental sustainability practices and policies.**

**5.1b: Leverage multiple revenue streams to support clearly defined university goals and responsible budget forecasts.**

Intercollegiate Athletics received $4.4M in total revenue for FY 2018, from ticket sales, sponsorships, concessions, and unrestricted Gary Fund donations.

The Office of Development and Alumni Relations received $15.3M in total cash gifts.

University senior leadership recognized the need to create a new vice president position dedicated to marketing and strategic communications. Realignment of existing resources to fund this position, and to provide significant new operational dollars for this unit, were completed.

The strategic resource management budget process was initiated to better align revenue streams with strategic initiatives for FY 2018. WMU's plan for a new budget model, to be implemented in FY 2022, will begin fall 2018 through the work of numerous campus-wide committees and ongoing dialogue.

WMU partnered with private donors and local corporations to fund the new product design and innovation program, to address operational needs and physical space renovation. The Richmond Product Design and Innovation Institute will combine the resources of WMU's Colleges of Fine Arts, Engineering and Applied Sciences, and Haworth College of Business. Industry involvement includes some of the top names in southwest Michigan manufacturing. The entity will house the new Bachelor of Fine Arts in Product Design Program. It also will serve as a base around which key southwest Michigan corporate partners can focus their product design and development needs.

The Office of Business and Finance partnered with the Western Michigan University Homer Stryker M.D. School of Medicine (WMed), so that this affiliate university could directly finance renovation costs currently residing as debt on WMU's books. This action provides an additional $65M in debt capacity for WMU.

**5.1c: Expand and improve integrated data-driven information systems for decision-making.**

The Divisions of Academic Affairs and Student Affairs worked collaboratively to merge two existing contracts into one, reduce costs, and maximize the Campus Labs Platform modules *Baseline, Compliance Assist (Accreditation and Program Review), Course Evaluations, Engage, Outcomes, and Planning.*

Enrollment Management, in the Division of Academic Affairs, purchased Salesforce and TargetX to provide the university with one system, instead of many divergent systems, and to track incoming and prospective students, and allow them to apply online. Salesforce allows WMU to communicate in an electronic and more effective manner with prospective students across the university. With the new system, prospects are able to apply online and then track the status of their application as it goes through the process. WMU is in Year 2 of the contract, and is currently working to train departments outside of the Office of Admissions and the Graduate College. Once a student is enrolled, Enrollment Management is able to track their success at WMU.
5.2a: Develop regionally competitive tuition models for academically qualified students.

Beginning with summer I 2017, basic and main campus tuition rates for newly admitted nonresident undergraduate students was reduced at 1.25 times the rate that Michigan residents pay. That means that, at 2016-17 basic tuition rates, annual tuition and required fees for a nonresident freshman or sophomore would be nearly cut in half. New freshman nonresident enrollment is up by 67.6 percent, and new transfer nonresident enrollment is up by 70.8 percent.

Extended University Programs, in the Division of Academic Affairs, received approval for a strategic pricing plan for regional site and non-Michigan locations for 2017-18. EUP students would now adopt the main campus resident and nonresident per credit hour tuition rates. As EUP has expanded the university’s presence to Florida, a unique undergraduate and graduate tuition rate would apply to any non-Michigan location based on competitive market analysis. A $60 per credit hour support fee was charged for all undergraduate online students.

5.2b: Utilize innovative and competitive financial aid strategies to maintain the fundamental principle of providing access to an affordable, quality education for all admitted students.

During FY 2018, academic colleges expended a total of $452,600 in available funds to support 126 students in completing their degrees. The Division of Academic Affairs made available $128,227 to support an additional 64 students, and the Office of the President provided an additional $71,826 to support 33 students.

For AY 2017-18, the Office of Student Financial Aid (SFA), in the Division of Academic Affairs began implementation and utilization of the Academic Works Scholarship Management platform to award endowed scholarships. With the tool, SFA was able to create an online scholarship application site, the Bronco Gold Mine, resulting in an 83 percent increase in scholarship applications. The use of the system will be extended to other university departments for AY 2018-19.

5.3c: Increase the number and scope of green programs that maximize return on university investment.

New academic programs that support sustainability were approved in 2017-18; four majors in the College of Arts and Sciences’ Department of Geography, and a minor in Food Service Operations in the College of Education and Human Development’s Department of Family and Consumer Sciences, in the Division of Academic Affairs.

Western Michigan University implemented paperless billing during summer II 2018. Students will no longer receive tuition bills in the mail. Instead, they will access their semester invoices online reducing paper waste.

WMU’s Georgeau Construction Research Center, in the College of Engineering and Applied Sciences (Academic Affairs), has funded $350,000 in grants to seven projects conducted by university faculty members. Project’s focus not only on the advancement of the construction industry through innovative research, but also on creating more sustainable and resilient construction systems and materials.

5.4a: Develop and execute an external and internal communication plan that effectively engages all stakeholders, and reflects the shared narrative of the university.

The Office of Community Outreach launched a “Partner with Us” campaign that seeks out new community partnerships and new community-based projects. The communication provides a central portal for external stakeholders to connect with the university expertise and resources. The website for the Office of Community Outreach has been revised for improved functionality and multi-media reach.

WMUK concluded Phase I of a strategic planning project with Livingston Associates, on June 20, 2018. A formal assessment report was presented to station management, the university administration, and staff. The presented report, and extensive research findings, revealed challenges in WMUK’s market position, but also emphasized opportunities for audience and revenue growth, community engagement particularly as it relates to WMU’s mission, and station mission realignment. The implementation phase (Phase II) of the strategic planning process is now underway.
As part of the *Shared Gold* plan, the Office of Community Outreach initiated a geo-mapping project to capture and convey the scope of WMU’s community engagement efforts. The map currently displays 10,374 discrete community engagement opportunities—including volunteer, service-learning, internship, clinical, fieldwork, and co-curricular experiences—offered to Western Michigan University students.

**5.4d: Implement a transformational wayfinding plan to improve navigation to and within WMU campuses.**

The Transformational Wayfinding plan, through the Office of Business and Finance, has been completed. The project included upgrades to campus maps, nomenclature, and signage to improve the clarity of wayfinding. It also developed a consistent nomenclature for naming campus streets, buildings, and landmarks. In addition, the effort provided a hierarchy of signage elements for campus approach, arrival, circulation, parking, and buildings.

In FY18, the Office of Development and Alumni Relations held Giving Day, a one-day fundraising campaign to engage alumni in philanthropy to WMU. Additionally, the Office developed new events to engage alumni including Western & Wine, Bronco BrewFest, and a series of alumni socials in key regions with significant alumni populations. In FY19, the Office will audit its current offerings and develop new programming to link alumni back to campus.

**5.5b: Raise external support for student scholarships, named professorships, innovation infrastructure, capital projects, and other university-identified priorities.**

The Office of Student Financial Aid, in the Division of Academic Affairs, now requires that all endowed scholarship recipients submit a letter of thanks to the donor of their awarded scholarship, which Development and Alumni Relations will forward to donors. The expansion of this requirement to scholarships university-wide, will improve accountability and reporting to donors, with the goal of creating increased stewardship and a virtuous cycle of donor giving.

A total of $4.5M in cash gifts was received through the Office of Development and Alumni Relations, in FY 2018, that were designated to student financial aid, colleges, and units.

The Office of Government Affairs allocated $50,000 for FY 2019 to provide contractual assistance to the Office of Vice President for Research for securing additional federal funding to support faculty.

**5.5a: Provide services that effectively connect and engage WMU’s global network of alumni and friends as advocates for the university.**

The Haenicke Institute for Global Education (Academic Affairs), in collaboration with Development and Alumni Relations, held alumni events in the Dominican Republic and Japan during 2018.

---

**Total percentage of responses for Goal 5**

- **Complete**: 20, 65%
- **Ongoing**: 11, 35%
- **Delayed**: 0
- **Canceled**: 0
Recommendations for Improvement

Implementation of the second year of the Gold Standard 2020 continued to demonstrate WMU’s growing strategic maturity. The integration of Collaborative Risk and Opportunity Management (CRŌM) with strategic visioning and reporting added a new depth of understanding and ownership to the university goals and objectives. The 80 plus CRŌM team members provided new perspectives from which to see what it will take to achieve the established priority strategies. Council activities provided the intense discussion among vice presidents that would be needed to lead the university through a time of transition into a new administration, while maintaining a commitment to the established Gold Standard 2020. As a result, there is a sense of greater transparency and buy-in to the strategic plan.

1. Plans are being made for the Council’s duties to be integrated into those of the President’s Cabinet; however, it is imperative the ongoing work of the CRŌM teams continue through the end of the five-year strategic plan. Consistency in this process is needed to better refine practices and become more integrated with other university risk management efforts. In addition, a well-established CRŌM process will be the strongest source of evidence available for the 2020-21 reaffirmation that WMU has met the Higher Learning Commission mandates for Criterion Five. Resources, Planning, and Institutional Effectiveness: The institution’s resources, structures, and processes are sufficient to fulfill its mission, improve the quality of its educational offerings, and respond to future challenges and opportunities. The institution plans for the future.

2. The additional request for divisions to report new or newly reallocated resources to strategic priorities helps demonstrate the link between budget and planning. In addition, the strategic resource management budget process was initiated to better align revenue streams with strategic initiatives for FY 2018. This alignment will be especially important as the university begins planning for a new WMU budget model to be implemented FY 2022.

3. The implementation of Planning, the Campus Labs online strategic planning reporting module, provided a modest movement toward standardization and ease of reporting. It will take a concerted and continued effort to fully maximize the capabilities of this enterprise platform. While all divisions participated in use of the reporting tool, the lack of standardization of terminology and alignment between division strategies and those of the Gold Standard 2020 made reporting less efficient. Time must be spent in creating a standardized report template that has clearly agreed upon terminology.

4. The 67 key performance metrics, aligned with the 24 strategic objectives, continue to serve as measures of accountability for the achievement of the Gold Standard 2020; however, these lag measures, and Carnegie peer comparisons do not provide the impetus for annual benchmarking and, if need be, reprioritization of strategies and resources. The
President’s Cabinet should invest time in creating lead indicators with annual benchmarks for specific strategies for which they will be held responsible. The recent significant change in vice presidential leadership would indicate new strategies may be expected in the remainder of the 5 year plan and, of course, key performance metrics should be utilized as measures of progress.

5. President Montgomery’s identification of transformational priorities (student success, diversifying revenue, and becoming a school of choice) provided a much needed focus for the large and comprehensive strategic plan. There now needs to be continued communication from the leadership on how the Gold Standard is moving the needle on these priorities. The continued questioning as to “who we are” may be now put to rest with a highly engaged marketing and communication effort, but how the plan serves to fulfill the greater mission of the University will need attention. This will be another critical source of evidence in the 2020-2021 HLC comprehensive visit.

6. Finally, as the Gold Standard 2020 reaches it’s half-way point, the president and cabinet need to identify where enhanced efforts are needed to follow through on strategies that were not originally identified as priorities. The Gold Standard 2020 has 108 strategies, 44 of which were prioritized for the first two years. It is now time to identify what other strategies should be raised to higher visibility and support, which ones should be identified as completed, delayed or cancelled in light of the president’s transformational priorities.

---

**Acknowledgements**

**Report Development**
Jody Brylinsky, Ph.D.
Associate Provost for Institutional Effectiveness
HLC Accreditation Liaison Officer (ALO)

Adriana Cardoso Reyes, MSW
Assistant Director, Institutional Accreditation and Planning
Office of Institutional Effectiveness

**Copyediting**
Cathe Springsteen
Assistant Director, Integrated Program Review and Accreditation
Office of Institutional Effectiveness
## Transformational Priorities: Metrics

### STUDENT SUCCESS

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.1</td>
<td>Average GPA after completion of first year – 3.03, spring 2018</td>
</tr>
<tr>
<td>4.2.1</td>
<td>2nd-year retention rate – 79.9%, fall 2018</td>
</tr>
<tr>
<td>2nd Year Retention Rate to 80%</td>
<td></td>
</tr>
<tr>
<td>4.2.2</td>
<td>6-year graduation rate – 52.1% fall 2018 pre-census data¹</td>
</tr>
<tr>
<td>6-Year Graduation Rate to 67%</td>
<td></td>
</tr>
</tbody>
</table>

### SCHOOL OF CHOICE

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.4.1</td>
<td>Western Wellness participation rate – 54.0%, November 2017</td>
</tr>
<tr>
<td>6.1.1</td>
<td>Percentage of returning student residents – 35%, fall 2018 pre-census data²</td>
</tr>
<tr>
<td>Campus Climate, Facilities, Safety, Employee Well-being</td>
<td></td>
</tr>
<tr>
<td>5.1.1</td>
<td>Tuition and fees as a percent of core revenues – 49.2%, fiscal year 2018</td>
</tr>
<tr>
<td>5.1.2</td>
<td>Endowment market value – $401.9M fiscal year 2017</td>
</tr>
<tr>
<td>Financial Sustainability, Enrollment Management</td>
<td></td>
</tr>
<tr>
<td>5.5.1</td>
<td>Amount of gift dollars received – $40M, Fiscal year 2017</td>
</tr>
<tr>
<td>5.5.2</td>
<td>Alumni giving rate – 4.0%, Fiscal year 2017</td>
</tr>
<tr>
<td>Increase Alumni Giving to 10%</td>
<td></td>
</tr>
<tr>
<td>3.1.4</td>
<td>Total amount of research &amp; development expenditures – $22.4M (WMU + WMed), Fiscal year 2017</td>
</tr>
<tr>
<td>Increase Research Expenditures to $50 M</td>
<td></td>
</tr>
<tr>
<td>2.3.1</td>
<td>Undergraduate student post-graduation success rate – 91.2%, summer 2017</td>
</tr>
<tr>
<td>2.3.2</td>
<td>Ranking on U.S. News and World Report – 207, spring 2017</td>
</tr>
<tr>
<td>Freshman Profile, Academic Excellence, Internationalization/Globalization</td>
<td></td>
</tr>
</tbody>
</table>

### DIVERSIFYING REVENUE

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.2.4</td>
<td>Enrollment yield rate – 22.2%, fall 2018 data</td>
</tr>
</tbody>
</table>

### High School Counselor Rating, Community Engagement

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.2</td>
<td>Percentage of freshmen entering with college credit from Advanced Placement (AP) or International Baccalaureate (IB) exams – 23.4%, fall 2017</td>
</tr>
<tr>
<td>2.3.2</td>
<td>Ranking on U.S. News and World Report – 207, spring 2017</td>
</tr>
</tbody>
</table>

### Note for Fall 2018 pre-census data

¹ The 6-year graduation rate for the 2018 cohort includes graduates only through summer I of Year 6. All other 6-year graduation rates are reported through summer II of Year 6. Final graduation rates for the 2018 cohort will be available in early October 2018, and will likely be higher than what is reported here.

² Students are still signing up for and cancelling housing. Official numbers won’t be available until census day.