Heidelberg Strategic Prioritization Processes and Initiatives
October 2019

Heidelberg University needs to deliver more disciplined strategic prioritization, positioning, resourcing, and execution of its programs, administrative services, organizational structure, and budgeting in order to fulfill its Core Student Mission more successfully in the rapidly changing and harshly competitive higher education market. Our Core Student Mission is framed and measured by the education excellence, the full engagement, the total success, the four-year graduation, and the preferred placement of our students.

When the Senior Leadership Team began discussing our annual Operating Budget deficits more intentionally and more strategically in FY 2016-2017, we realized the imperative to change our operations because Heidelberg must achieve balanced (and then surplus) operating budgets in order to succeed. We talked about "operational effectiveness" in terms of getting better results with the same resources (and even more superior results with more resources) and about "operational efficiency" in terms of getting at least the same results with less resources (and even better results with less resources). The group aligned on the simple understanding that operating budgets are about achieving the desired business results. Budgets are not inherently about equality, fairness, or equity.

When the SLT began to initially discuss academic programs and administrative services prioritization in 2017-2018, we quickly appreciated how complex and challenging this kind of task is for an institution like Heidelberg. On the inside, there is a lot of professional and personal history, passion, commitment, care, interest, and investment in practically everything that goes on at our school. On the outside, with the possible exception of about 15,000 alumni, the harshly competitive world does not really care ultimately whether our school even exists. We realized the urgency to reposition our institution in the new higher education marketplace.

The SLT discussed and framed the quintile assessment of academic programs and administrative services in Summer 2018: 1) Investment to grow and enrich; 2) Sustain to improve and maintain; 3) Reduction to resize and optimize; 4) Restructuring to shift and reorganize; and 5) Elimination to sunset and delete. It is easy to create such an assessment framework. It is hard to actually classify programs and services using that framework and then take action.

The new campus wide and transparent Heidelberg FY 2019-2020 Strategic Budgeting Prioritization process emerged out of those assessment discussions in Fall 2018.

As the SLT engaged in a series of Strategic Programs and Administrative Services Prioritization Dialogues during May-August, 2019, every member presented their best thinking about their own areas of responsibility and about the entire University. Our ideas, suggestions, questions, and challenges galvanized into these four areas of prioritization:

1. Strategic Programs Prioritization
2. Strategic Administrative Services Prioritization
3. Strategic Organizational Structure Prioritization
4. Strategic Budgeting Prioritization

This document summarizes the prioritization work across the entire University over the past couple of years and continuing forward. As described briefly in the Executive Summary, all operating divisions and departments are going through some kind of prioritization process. Some processes are more challenging and complex, some are more quantitative than qualitative, and some are simply different than others. We want broad understanding, engagement and transparency in this work. The overarching goal of our strategic prioritization efforts is to strengthen Heidelberg.

In addition, please also see the two pie charts showing Heidelberg's FY 2018-2019 Expenditures by operating and functional categories.

Academic Affairs

AA is continuously evaluating the alignment between programs, resources, and the University Mission in order to best serve students while maximizing resources to achieve the goals of increasing enrollment, retention, and graduation rates (i.e., student success). We need to use our resources to the greatest effect via sustainable staffing, curriculum, and scheduling models. All programs must run more effectively and more efficiently than ever before to survive and grow in the current academic marketplace. We also continuously evaluate the resources and support available for academic departments and the support available for faculty and their many roles and responsibilities. This assessment takes place through continuous review of the resources available in all offices reporting through Academic Affairs (i.e., Center for Teaching Excellence, Beeghly Library, Honors Program, Office of the Registrar, Owen Center for Academic and Career Support). Finally, the AA organizational structure must provide the administrative oversight and support to enable the best educational opportunities for our students.

Programs

- Hired 13 new faculty members to support the Academic Strategic Initiatives for Improvement Plan in Fall 2018, including 6 to replace faculty retirements and resignations (Counseling, English, Marketing, Political Science, Psychology & Criminology, and Special Education), 3 to backfill for faculty stepping into administrative positions (Chemistry, Communication, and Counseling), and 4 to create new incremental faculty lines (Accounting & Finance, English, Exercises Science, and Management & Information Systems).

- Eliminated 4 voluntarily vacated faculty lines in Spring 2019 (Education, Education, English, and Music) based on external (market demand) and internal (enrollment/credit hour generation) assessment after faculty retirements and resignations.

- Hired 8 new faculty members to support ASIIP in Fall 2019, including 6 to replace faculty retirements and resignations (Athletic Training, Biology, Business, Business, Business, and Psychology & Criminology) and 2 to establish new incremental faculty lines (Biology and Communication & Media).

- Currently searching to hire 3 new replacement faculty members in Biology (Anatomy & Physiology), Biology (Ecology), and Spanish & German (taking a part-time line and creating a full-time line).

- Initiated the Academic Affairs Strategic Programs Prioritization process in Fall 2019 to evaluate and prioritize resources for greatest impact on recruitment, retention, and graduation rates based on student demand, employment opportunities, degree fit, competitive intensity, and a holistic revenue/cost analysis to accomplish our Core Student Mission.

- The Faculty is developing a new General Education Integrated Studies Program to replace the current General Education Traditional Distribution model in order to respond more effectively to external market demand, better prepare our students for their careers and lives, and streamline the General Education course catalog by May 2020.

- The Director of the Honors Program, with guidance from the Honors Program Committee and input from the full Faculty, is reviewing The Life of the Mind Honors Program in the context of the new General Education Program to propose changes by May 2020.

- The Executive Director of the Owen Center for Academic and Career Support and the Academic Affairs Leadership Team are evaluating what services address the greatest needs of our students to develop better academic advising and support.

Administrative Services

- Based on Faculty recommendations and a student needs assessment during the ASIIP work, established a new half-time Director of the Center Teaching Excellence position, a new full-time Instructional Technologist position, and a new full-time Coordinator of Student Accessibility Services position in Fall 2018.

- Optimized the Beeghly Library staffing by reducing one full-time line to maintain focus on student needs, academic department needs, and faculty needs.

- Currently searching to hire a new replacement Registrar who will then lead a review of the Registrar's Office staff positions to ensure that all institutional needs are met, including the needs of our students, faculty committees, and academic departments.

- Currently searching to hire a new replacement Director of Academic Assessment and Effectiveness to provide greater focus and support on curriculum development, accreditation requirements, as well as recruitment and retention action plans.

Organizational Structure

- Eliminated the vacated Administrative Assistant to the Provost position and merged those responsibilities into the Executive Assistant to the President, Provost and Board of Trustees in 2017-2018.

- Eliminated one of the four Academic Dean positions after a retirement in 2018-2019 and created three Academic Divisions: Allied Health, Behavioral, and Natural Sciences; Humanities, Education, and the Arts; and Business and Technology.

- Eliminated the Associate Vice President for Academic Affairs position after a retirement in 2018-2019, redistributed those responsibilities to other members of the Academic Affairs Leadership Team, and streamlined leadership reporting of the Honors Program, Center for Teaching Excellence, Registrar, and Library directly to the VPAA & Provost.

Student Affairs

SA has been working to elevate its strategic thinking and institutional perspective over the past two years. Each department engages in strategic framing and planning yearly to produce an annual report. While the main purpose of this exercise has been to strengthen how all members of the Student Affairs Leadership Team challenge the thinking in their areas of responsibility and in those key partnering functions, our reports were also shared with the Director of Academic Planning, Assessment, and Institutional Effectiveness each year. These yearly reports included SA goals, mission and programs connected to the University Mission and Vision, the critical programming changes, and student learning outcomes with student success stories. Our intent is to continuously integrate all cocurricular and extracurricular programming and services into supporting Heidelberg's Core Student Mission.

Programs

- Improved student mental health staffing model in Residence Life by working with Counseling and Psychology faculty members to enable 2 graduate counseling students to serve on the new CARE Team and as the "first line of defense" for overnight on-call student mental health situations.

- Refilled a vacated part-time Counselor position in the Stoner Health & Counseling Center and expanded the hours of student counseling coverage with another Counselor after the hiring of a full-time Coordinator of Student Accessibility Services in the Owen Center.

- Promoted current part-time Women's Assistant Golf Coach (with full-time academic support position) to part-time Women's Head Golf Coach (with full-time academic support position) to provide greater golfing expertise and give greater emphasis to recruiting, retaining, and graduating students.

- Continue to support Women's Golf, Men's Golf, Women's Tennis, and Men's Tennis with head coaches who also have other assistant coaching jobs or other staff positions.

- Completed Heidelberg's NCAA Athletics Department Gender Equity Internal Audit with Human Resources in October 2019 and will implement all six recommendations (tri-annual opportunity surveys, facilities, game and practice times, equipment and supplies, publicity, and recruitment budgets) over the next year to strengthen women's athletics.

- Hired a new full-time Women's Head Lacrosse Coach to replace the vacated line with the expectation of increasing the recruitment, retention, and graduation of female lacrosse student-athletes significantly in the next two years.

- Strengthening the HYPE Career Ready Program by integrating it with Student Career Development and Placement Services, and to include all internships, externships, campus work study, and placement responsibilities through hiring a new Director of HYPE Career Ready, reallocating the vacated Greek Life staffing line, and staffing the 3-person HYPE CR team as a direct report to the Dean of Student Affairs.

- Continuing to evaluate all Athletic programs to support the 65% of our student athletes who participate in NCAA Division III athletics and to meet the recruitment, retention, and graduation objectives that achieve our institutional enrollment and education goals.

Administrative Services

- Changed the current Graduate Assistant contracts to move GAs off campus to accommodate traditional undergraduates in the residence halls in Summer 2019.

- Cut back on some early returner groups in Residence Life, Spiritual Life, and Multicultural Student Affairs to save on early returner meals in Summer 2019.

- Piloting a Half Meal Plan for students who live in apartment style housing this year and plan to introduce a Half Meal Plan and a Differential Resident Housing Pricing Plan for apartment style housing next year.

- Piloting a Coaches Student Success Incentive Plan this year to increase male student athlete retention and graduation rates over the next four years.

Organizational Structure

- Evaluating support for Greek Life pending colleague move to Human Resources in November 2019 and plan to reallocate this line position funding to expand the HYPE Career Ready Program team.

- Providing administrative support to the Owen Center for Academic and Career Support with scheduling and accessibility services testing administration.

Budgeting

- Reallocated funding by changing the Residence Life Graduate Assistant Hall Directors compensation structure from tuition, room, board and stipend to tuition and room.

- Deferred the Athletics request for professionally-driven buses for all team competition trips due to incremental expense of $100,000 to provide buses for all teams.

- Given that Athletics has been doing zero-based travel and support budgeting based on the annual contest schedules for years, we will reexamine all travel schedules this year.

- Planning to assess HYPE Career Ready Program impact of reducing keynote speakers from six to four annually for potential savings of nearly $40,000 in speaker fees.

Enrollment Management

EM leadership has been extremely vigilant about prioritizing its resources to support its recruiting and financial aid leveraging strategies over the past six years. On the one hand, the recent and current management team has demonstrated great focus and tenacity in advocating, building, and funding Heidelberg's Financial Aid Leveraging Model to recruit our traditional incoming enrollment numbers relatively successfully in a tremendously challenging and rapidly shrinking higher education student market. At the same time, the team has also supported targeted attempts to recruit in new ways, such as internationally over the past two years. The University's strategic prioritization processes have triggered new EM thinking since May. Key questions include "How should we address the value and affordability challenge successfully?" and "How do we attract to retain an expanded student enrollment mix alongside our current student profile mix?" The summary points that follow reflect some of these discussions.

Programs

- Launched new Student Campus Visit Program to increase campus visitation with greater impact through better Admission Counselor oversight of student ambassadors, more student visit contact with faculty, an improved Parkhurst dining experience, and fixed registration/arrival schedules based on selective campus visit start times.

- Developing a new *Berg.Like.Me Scholarships* platform to strengthen much needed targeted demographic recruitment, improve value and affordability, and frame a sharper marketing message.

Administrative Services

- Implemented the Common Application platform to increase applications significantly and reduce the need for buying all current student search engine services.

- Evaluating a new Customer Service Management platform to improve all ongoing communication, support, and tracking of student prospects and their families.

Organizational Structure

- Implemented new Admission Counselor structure in August 2019 that assigns half of the Admission Team to academic areas to become recruiting experts by majors/programs on campus while the rest of the team recruits all students on the road.

- Expanded the scope and focus of the vacated Vice President for Enrollment Management position by deciding to move the entire Marketing and Communication Services group from University Advancement and Marketing to this job in order to integrate our strategic focus on building student enrollment, an organizational move that will occur after the new VP EMM is hired.

- Continue to evaluate the entire Enrollment Management Team structure to determine possible ways to restructure and/or reallocate resources to improve enrollment building effectiveness and/or to gain enrollment building efficiencies.

Budgeting

- Reduced budgeted funding for staff travel, student search engine services, and recruiting print materials to better optimize total use of funds.

- Delayed the search and hiring processes to refill one vacated Admission Counselor and the vacated Associate Director of Financial Aid position to capture budgeted vacancy savings.

- Will manage the existing Enrollment Management Team and conduct the Vice President for Enrollment Management and Marketing search process without hiring an interim VP for the rest of the fiscal year to capture budgeted position vacancy savings.

University Advancement and Marketing

UAM holds strategic planning conversations monthly to evaluate and decide how best to serve the entire Heidelberg campus community. Given our relatively small organizational size compared to peer institutions, we have more agility to change faster and respond to needs as they arise. In our annual strategic planning, we evaluate our programs, services, and processes in order to be as efficient and effective as possible. UAM utilizes the following assessment barometers in these strategic conversations: Red Light (stop doing what does not work); Yellow Light (continue doing what does work); and Green Light (start doing new things that would positively affect our efforts).

Administrative Services

- Introduced new online giving platform *IModules* to increase alumni giving percentages, engage younger alumni, and make our online giving process easier and friendlier in September 2019.

- Decided to convert all fundraising printed materials to digital formats to increase messaging reach and reduce budgeted spending.

- Developed and rolled out a new *InsideHeidelberg* webpage to provide a campus wide solution for internal communications with an all-campus calendar in Spring 2019.
- Planning to implement *Text to Give* this year and exploring how to utilize other financial portals like Venmo and PayPal.

- Continuing to evaluate the Landmark Reunion model for building alumni engagement and donor support as part of the annual Alumni Weekend.

Organizational Structure

- Eliminated one vacated administrative assistant line to reallocate funding line to support development of a new data analytics position in Administration and Business Affairs.

- Redefining other vacated administrative assistant line to provide optimal shared support for UAM and ABA teams.

Budgeting

- Reallocated savings from changing print to digital fundraising materials to new *IModules* introduction.

- Planning to engage more alumni through more Heidelberg events and pass on those costs to participants while soliciting key donors to support those efforts.

Human Resources

HR is engaging in the University's strategic prioritization processes as both a primary advisor colleague to other departments and in terms of managing its own areas of responsibility as strategically as possible. When the Senior Leadership Team began to discuss programs and administrative services prioritization in earnest in Spring 2018, and that led to the launch of the Strategic Budgeting Prioritization process in Fall 2018, the Office of Human Resources and the Offices of Campus Safety & Security were excited to participate and contribute. There are several specific prioritization initiatives that HR has undertaken over the past six months and others that will unfold over the next year.

Programs

- Accepted the appointed opportunities to contribute team leadership to the Heidelberg Diversity, Equity, and Inclusion Committee (already launched), the Heidelberg Definition of Shared Governance Committee (already launched), and the Heidelberg hospitality customer service delivery plan initiative (to be framed and established) in 2019-2020.

- Completed Heidelberg's NCAA Athletics Department Gender Equity Internal Audit with Student Affairs in October 2019 and will implement all six recommendations (tri-annual opportunity surveys, facilities, game and practice times, equipment and supplies, publicity, and recruitment budgets) over the next year to strengthen women's athletics.

Administrative Services

- In collaboration with the Krammes Services Center and CNIT to evaluate, maintain, and replace security cameras in 2018-2019, HR switched from private contractor outsourcing to totally in-house installation and programming to gain improved camera quality, increased number of campus cameras, planned replacement schedules, and realized annual cost savings.

- Based on results from the Office of Campus Safety & Security conducting its first ever Campus Customer Satisfaction Survey in Spring 2019 to evaluate all services provided to students, faculty, and staff (as shared with the Board of Trustees), reevaluated and changed the processes for parking lot location management, writing parking tickets, and the frequency of lot "checks."

- In collaboration with Student Affairs to evaluate the University's online training provider for campus training in Spring 2019, including the sexual discrimination training that is required for all 1st year students, secured a new provider with much easier administrative functionality and a much more expansive training library for 46% less cost.

Organizational Structure

- Based on industry analysis of optimal staffing ratios that showed significantly lower than what would be considered best practices at our institution, conducted an internal-only search process for a new incremental HR Generalist line and hired the successful candidate from Student Affairs who will begin in November 2019 to focus on improving Heidelberg's search committee processes and new employee on-boarding experiences.

Budgeting

- Evaluating health care consulting services with committee of Faculty, Trustees, and staff to find best partner to improve Heidelberg's health benefits programs through a comprehensive RFP process during Summer/Fall 2019.

- Anticipating higher health benefits administrative fees but also cost savings opportunities on stop loss insurance, prescription costs, and provider networks, as well as new administrative tools such as enrollment software and mobile apps, dedicated customer service lines, in-house actuarial and legal counsel, and 3rd party wellness partnerships.

Administration and Business Affairs

ABA discusses institutional and departmental prioritization questions frequently during its leadership team meetings. In addition to providing administrative and business services for all students and employees, our areas of responsibility include functional opportunities to manage with greater focus, prioritization, and impact on the ultimate success of the University. Below is a synopsis of what this division has been working on continuously for prioritization since fiscal year 2018-2019. In a key area of opportunity, ABA optimizes existing staff and resources in CNIT as we improve/add on to the IT infrastructure and services to support both academic and administrative systems. Implementing the multi-year HeiTECH 2020 Plan remains a very high priority to strengthen Heidelberg through greater operational effectiveness and efficiency.

Programs

- Introduced new long-term food service partner with Parkhurst Dining in 2017-2018 to deliver fresh, local, and healthy food options to campus and to renovate Hoernemann Refectory (Summer 2017), to create the Clean Plate Station (Winter 2019), and to build The HeidelBean! (Spring 2019).

Administrative Services

- Negotiated the Faculty & Staff $5 Meal Rate Plan with Parkhurst Dining in 2018-2019 and secured new pricing to minimize the meal rate plan increases for students this year.

- Negotiated to maintain the same premium for Student Athletics Insurance in 2019-2020 which represents lower annual costs compared to previous years.

- Negotiated to maintain the same Heidelberg liability premium policies for 2019-2020 except for small increases in auto premium policies that reflect nationwide trends.
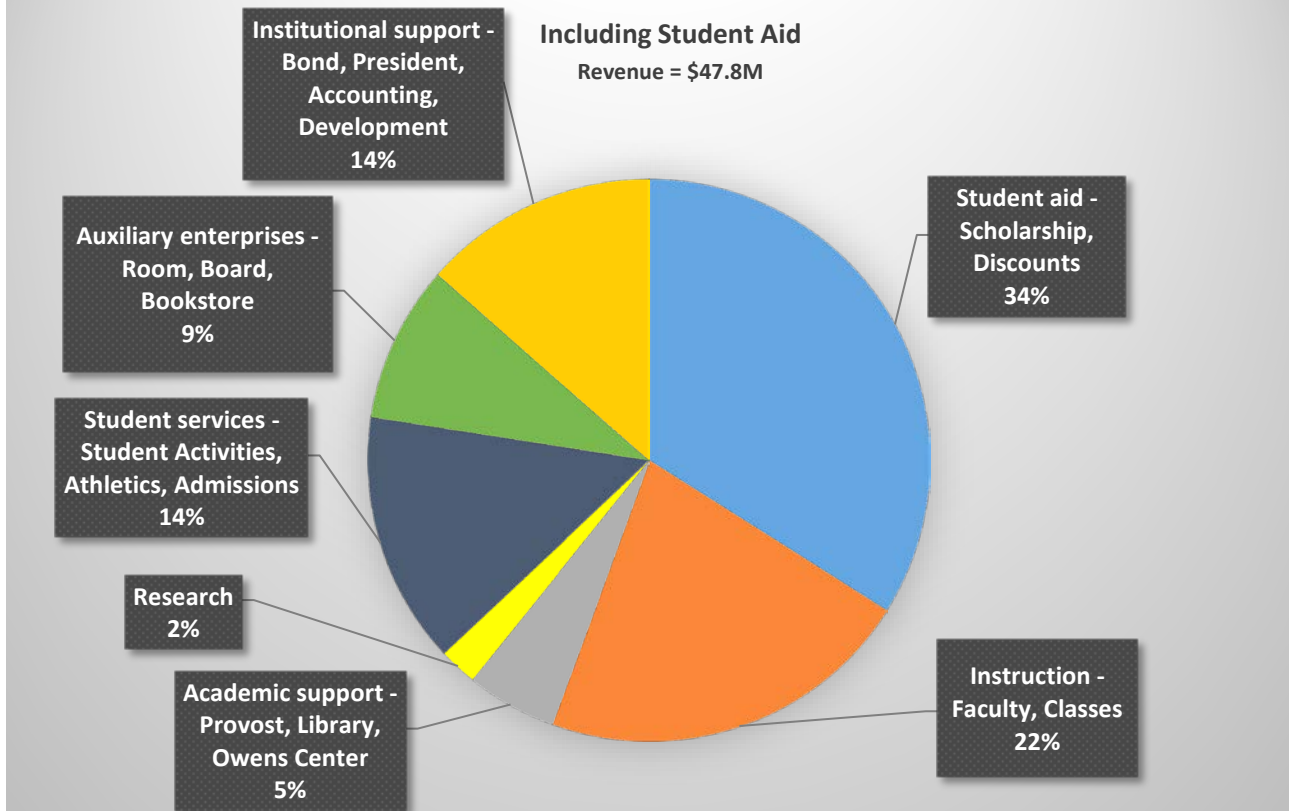
Organizational Structure

- Eliminated vacated staffing lines in the Business Office and the Krammes Service Center.

- Restructured the full-time Bookstore Manager position and promoted current assistant to new Bookstore Supervisor position to handle revamped book order processes and give more focus on effective retail management.

- Planning to reallocate vacated full-time administrative support position in UAM to fund new data analytics position in ABA to provide institutional/market data and perform more in-depth financial analyses in support of strategic decision making processes.
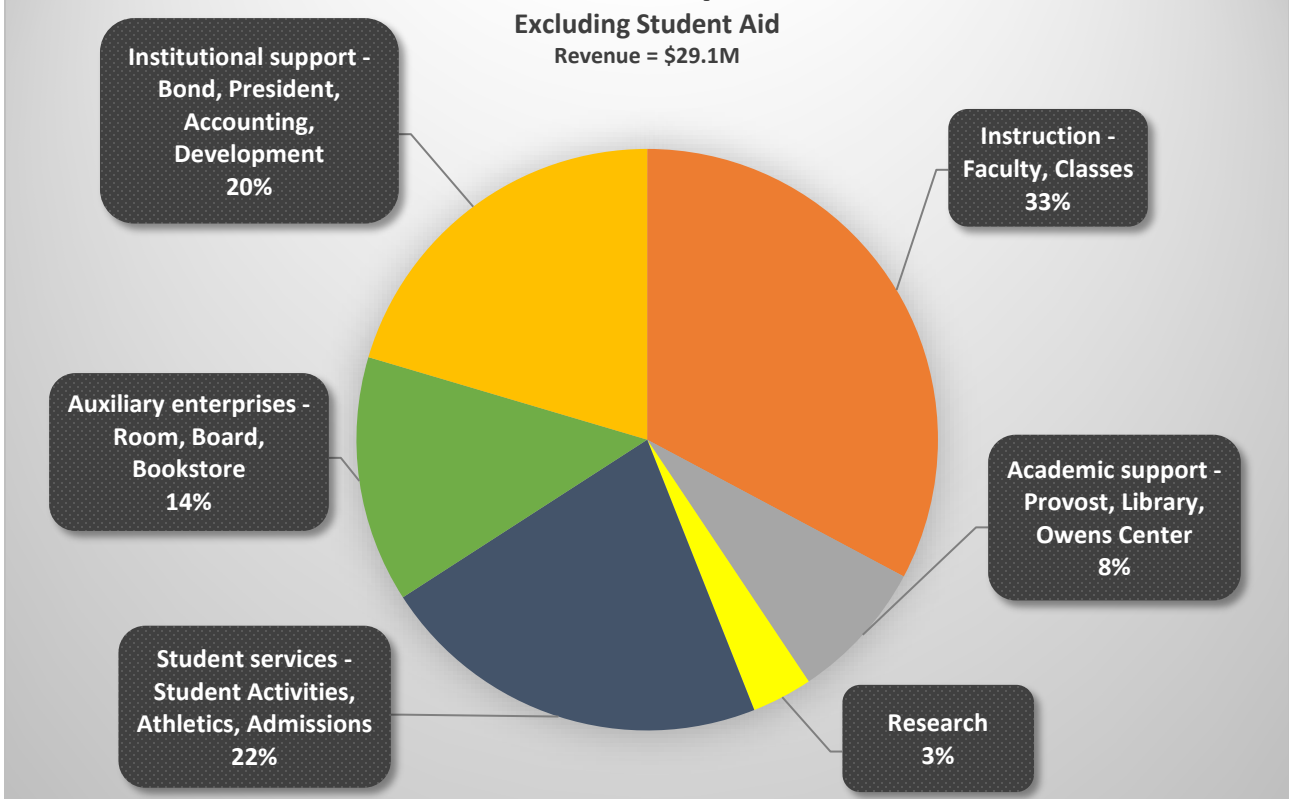
Budgeting

- Directed the University's FY 2019-2020 Strategic Budgeting Prioritization process that reduced the preliminary FY2020 Operating Budget deficit of ($1,814,000) in June to our recommended final FY 2020 Operating Budget deficit of ($255,000) in October 2019.

FY 2018-2019 Expenditures

Including Student Aid

Revenue = $47.8M

Institutional support - Bond, President, Accounting, Development 14%

Auxiliary enterprises - Room, Board, Bookstore 9%

Student services - Student Activities, Athletics, Admissions 14%

Research 2%

Academic support - Provost, Library, Owens Center 5%

Student aid - Scholarship, Discounts 34%

Instruction - Faculty, Classes 22%

FY 2018-2019 Expenditures

Excluding Student Aid

Revenue = $29.1M

Institutional support - Bond, President, Accounting, Development 20%

Auxiliary enterprises - Room, Board, Bookstore 14%

Student services - Student Activities, Athletics, Admissions 22%

Instruction - Faculty, Classes 33%

Academic support - Provost, Library, Owens Center 8%

Research 3%

*Does not list all department names under each functional expense