Eastern Michigan University
Strategic Plan Update
March 31, 2015
Process: How did we get here?

Institutional Strategic Planning Council (ISPC):
40+ meetings since 2011

Faculty Senate Input:
14 meetings since 2011

Campus forums with President Martin:
6 events in 2014

Campus messages from the President:
Nov. 2011, July 2013, April 2014

Board of Regents:
June 2013 approval of Mission, Vision, and Core Values
ISPC Members

Sue Martin: President
Sharon Abraham: Director of Diversity/Affirmative Action
Jessica Alexander: Assoc. Professor, CMTA
Colin Blakely: Department Head, Art
Jim Carroll: Assoc. Provost, Research & Administration
Ted Coutilish: Assoc. Vice President, Marketing
Matthew Evett: Professor, Technology Studies; Faculty Senate
Tara Lynn Fulton: Dean, University Library
Ellen Gold: Asst. Vice President, Student Well Being
Raouf Hanna: Emeritus Faculty, Economics
John Koolage: Assoc. Professor, History & Philosophy

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Walter Kraft: Vice Pres., Communications
Judith Kullberg: Assoc. Prof., Political Science
Desmond Miller: Student Gov’t President
Murali Nair: Dean, College of HHS
Bin Ning: Asst. Vice President & Exec. Director of IRIM
Alexandra (Sandy) Norton: Professor, English Language & Literature
Carl Powell: Asst. Vice President & CIO
Christian Spears: Deputy Athletic Director
David Turner: Vice President for Univ. HR
Mike Valdes: Chief Financial Officer
Casey Wooster: President’s Office

http://www.emich.edu/strategicplan/council_members/
Mission, Vision and Values
MISSION
EMU enriches lives in a supportive, intellectually dynamic and diverse community. Our dedicated faculty balance teaching and research to prepare students with relevant skills and real world awareness. We are an institution of opportunity where students learn in and beyond the classroom to benefit the local and global communities.

VISION
Eastern Michigan University will be a premier public university recognized for student-centered learning, high quality academic programs and community impact.
CORE VALUES

**Excellence**- We provide an exceptional environment to our faculty, staff, and students. We improve our performance continuously and strive to be the best in everything we do.

**Respect**- We care for our people, communities and the environment and show respect for the dignity of the individual.

**Inclusiveness**- We create an environment that supports, represents, embraces and engages members of diverse groups and identities.

**Responsibility**- We are accountable – individually and in teams – for our behaviors, actions and results. We keep commitments.

**Integrity**- Integrity and transparency are critical to our institutional effectiveness. We pursue the highest level of personal, intellectual, academic, financial and operational integrity within the University community.
Strategic Themes, Goals & Objectives

- **Themes**
  - 4 Strategic Themes

- **Goals**
  - 11 Goals

- **Objectives**
  - 30 Objectives + 2 Proposed Objectives

- **Tasks**
  - Under development at the Division/Department level
Strategic Themes

1. Student Engagement & Success
   → 3 Goals → 7 Objectives

2. High Performing Academic Programs and Quality Research
   → 3 Goals → 11 Objectives

3. Institutional Effectiveness
   → 3 Goals → 8 Objectives + 1 Proposed Objective

4. Service and Engagement
   → 2 Goals → 4 Objectives + 1 Proposed Objective
Proposed Changes to Objectives & Goals

Based on input from the campus community...

Goal #3.1 (Institutional Effectiveness): Foster a diverse, ethical, safe, and respectful workplace that supports the University’s mission.

Proposed Objective 3.1.5 (Institutional Effectiveness): Continue to implement measures to enhance the safety of the campus and surrounding community.

Proposed New Objective 4.2.3 (Service and Engagement): Design and implement evaluation tools to assess community perceptions of, and the University’s impact on, the surrounding community.
Tasks

- Divisions and departments are developing individual Tasks consistent with the Strategic Themes, Goals, and Objectives
  - Academic & Student Affairs → TASK LIST COMPLETED
  - Other divisions → TASK LIST NEARLY COMPLETED

- Local control
  - Tasks are developed & implemented at the department-level

- Proposed tasks requiring funding will go through normal budget process
Sample Task

Example: Enrollment Management

1.2.2: “Connect students through existing structures to resources that will support student well-being across the University (e.g., academic, social, physical, emotional, financial)”

Task: Develop outreach and personalized counseling for students who are on the edge of maintaining financial aid eligibility (completion rate of 67-70% and/or GPA 2.0-2.49)

Metric: Improved GPA and/or completion rates, as well as persistence & retention for students in the defined range

Process Owner: Director of Financial Aid

Timeline: 2015
What does success look like?

Example: Quality Initiative (QI) to improve Academic Advising

- Approved by Higher Learning Commission (HLC) as part of accreditation process
- Cited on HLC website as a good example of what institutions are doing to improve student learning!
  - [http://qi.hlcommission.org/Proposals/eastern-michigan-university.html](http://qi.hlcommission.org/Proposals/eastern-michigan-university.html)
- Implementation began October 2014
  - Phase 1 of 3 completed (collecting & analyzing initial data)
- Strategic Plan Goal 1.2: “Develop a comprehensive and systematic approach to improve services and processes that enhance student persistence and graduation”
Next Steps

- Administrative divisions completing their Task list
- Academic & Student Affairs has begun work on individual Tasks
- Websites will be updated with applicable Plan information and sample Tasks
- Incorporate Tasks into the new HR employee evaluation system over the next 6-18 months
Eastern Michigan University

Financial State of EMU

March 31, 2015
Overview:

1. Discuss Financial Environment of EMU
2. Review recent EMU Key Metric Performance
3. Provide context for organizational needs
4. Share perspective of external agencies
Student Credit Hour History

<table>
<thead>
<tr>
<th>Year</th>
<th>Credit Hours</th>
</tr>
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<tbody>
<tr>
<td>2006-07</td>
<td>537,718</td>
</tr>
<tr>
<td>2007-08</td>
<td>524,679</td>
</tr>
<tr>
<td>2008-09</td>
<td>513,148</td>
</tr>
<tr>
<td>2009-10</td>
<td>535,096</td>
</tr>
<tr>
<td>2010-11</td>
<td>546,323</td>
</tr>
<tr>
<td>2011-12</td>
<td>538,783</td>
</tr>
<tr>
<td>2012-13</td>
<td>537,756</td>
</tr>
<tr>
<td>2013-14</td>
<td>532,787</td>
</tr>
<tr>
<td>2014-15</td>
<td>524,880</td>
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</table>
Student Headcount

<table>
<thead>
<tr>
<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate:</td>
<td>17,762</td>
<td>18,529</td>
<td>18,569</td>
<td>18,914</td>
<td>19,084</td>
</tr>
<tr>
<td>Graduate:</td>
<td>5,096</td>
<td>4,974</td>
<td>4,772</td>
<td>4,588</td>
<td>4,233</td>
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<tr>
<td>Total:</td>
<td>22,858</td>
<td>23,503</td>
<td>23,341</td>
<td>23,502</td>
<td>23,317</td>
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CHHS & COE – Shifting Mix

![Bar chart showing the comparison of CHHS and COE from FY10 to FY14.](chart.png)

- FY10: CHHS 57,702, COE 55,425
- FY11: CHHS 56,326, COE 61,039
- FY12: CHHS 53,681, COE 64,348
- FY13: CHHS 48,796, COE 69,241
- FY14: CHHS 55,425, COE 71,201
Net vs. Gross Tuition History

FY09  154.7  179.5
FY10  160.0  193.4
FY11  162.7  199.2
FY12  167.4  205.3
FY13  168.5  210.8
FY14  170.1  215.3
FY15 (Budget)  176.0  219.8
State Appropriations History

<table>
<thead>
<tr>
<th>Year</th>
<th>Appropriations</th>
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<tbody>
<tr>
<td>FY09</td>
<td>78,551,800</td>
</tr>
<tr>
<td>FY10</td>
<td>75,965,595</td>
</tr>
<tr>
<td>FY11</td>
<td>76,026,203</td>
</tr>
<tr>
<td>FY12</td>
<td>64,619,095</td>
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<tr>
<td>FY13</td>
<td>66,526,774</td>
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<tr>
<td>FY14</td>
<td>67,595,296</td>
</tr>
<tr>
<td>FY15 (Budget)</td>
<td>71,771,100</td>
</tr>
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The chart above shows the state appropriations history from FY09 to FY15, with the budget for FY15 indicated as 71,771,100.
State Appropriation - Percentage of Revenues

2009:
- State appropriation: 34%
- Other sources: 66%

2014:
- State appropriation: 28%
- Other sources: 72%
Investment Income Trends

FY10: $5,375,956
FY11: $6,716,471
FY12: $3,098,096
FY13: $4,076,890
FY14: $4,332,990
FY15 (Budget): $3,000,000
History of Sponsored Awards

FY10 | FY11 | FY12 | FY13 | FY14
---   | ---  | ---  | ---  | ---
16,001,062 | 12,536,576 | 10,423,334 | 10,953,041 | 7,361,231
## Key Ratios

<table>
<thead>
<tr>
<th>Ratio</th>
<th>FY09</th>
<th>FY14</th>
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<tbody>
<tr>
<td>Primary Reserve (Res./Exp.)</td>
<td>24%</td>
<td>9%</td>
</tr>
<tr>
<td>Viability Ratio (Res./Debt)</td>
<td>30%</td>
<td>13%</td>
</tr>
<tr>
<td>Net Income (Rev./Exp.)</td>
<td>1.7%</td>
<td>(1.3%)</td>
</tr>
<tr>
<td>Composite Score</td>
<td>2.7</td>
<td>1.5</td>
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</table>
# Rating Agencies

<table>
<thead>
<tr>
<th>Agency</th>
<th>Rating</th>
<th>Outlook</th>
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<tbody>
<tr>
<td>Moody’s</td>
<td>A1</td>
<td>Negative</td>
</tr>
<tr>
<td>S &amp; P</td>
<td>BBB+</td>
<td>Stable</td>
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</table>
Agency Comments

• **Challenges**
  – Little Financial Flexibility
  – Operating performance is weak
  – Continued long-term capital and deferred maintenance needs
  – Mostly in-state students with a decreasing demographic in Michigan
  – Increased Pension costs
  – Diminished state funding environment
Agency Comments

• **Opportunities**
  – Serves an important economic role in the State of Michigan, enrolling over 17,000 FTE students in a diverse array of programs.
  – Recently stabilized enrollment
  – MGMT uses conservative budgeting and engages in periodic program review.
  – Ability to reallocate resources away from low demand programs to higher demand programs.
  – Historical positive operating performance on a cash basis.
  – Several years of capital investment enhances the University’s competitive position.
  – Ongoing financial support from the State, albeit reduced.
  – Manageable maximum annual debt service.
We value your input!

- Budget presentation online: http://www.emich.edu/busfin/budgetforums.php
- Strategic Plan website: www.emich.edu/strategicplan/
- Strategic Plan comments are welcome: emu_ispc@emich.edu
Questions?

Thank you!