

# **UNITED STATES UNIVERSITY**

## **STRATEGIC PLAN**

**2015-2019**

Approved by the Board of Trustees

March 24, 2015

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## **Introduction**

United States University (USU) began in 1997 as InterAmerican College (IAC), a small, nonprofit educational institution developed to serve the needs of primarily Hispanic students in Southern California. The institution was founded with a deep sensitivity to diversity and offered small classes and in-demand programs with a strong focus on health care and teaching. It immediately attracted an international student population. Today, these characteristics are the hallmarks of United States University. As an example, in 2009, there were 12 languages spoken by USU faculty, staff and students; today there are more than 34.

In late 2009 IAC became a for-profit institution with new administrative leadership which changed the name to United States University. A period of change and turmoil ensued and by 2011, the institution was in a financially precarious position. Two years later, the institution's regional accrediting agency determined that its documentable progress toward compliance with accreditation standards was insufficient, resulting in an "accredited, on probation" designation.

In early summer 2013 with a new administration in place and stability in the leadership team, USU began work on a 2014-2015 Strategic Plan. As President Cole wrote in his letter of introduction to that plan:

"The University is mindful of the work that needs to be accomplished to bring the institution into compliance with WASC. . . Given the legacy problems facing the institution, the USU community realizes that [this] strategic plan must include shorter-term timelines that do not extend beyond 24 months; strategic directions that are highly targeted and which address USU's most pressing issues; and create a culture of continuous strategic planning that aligns initiatives with the mission of the University."

## **How the plan was developed**

In June, 2014 USU began the process of creating a four-year strategic plan, thus moving away from the triage-planning represented by the 2014-15 Strategic Plan. The planning began with a community-wide meeting in which students, faculty, and staff met in discussion groups to develop a vision of USU in the future and articulate activities which would fulfill that vision. In late summer a steering committee was established, with staff, faculty, student, and trustee participation. A second community meeting was

held to obtain additional thoughts regarding a formal vision statement for USU. Information from this latter meeting was reviewed by the steering committee; a vision statement was created and made available to the community for comment. Community comments were collated and reviewed, and the vision statement was revised. The executive committee of the Board of Trustees (BoT), which includes the institution’s principal owner/investor, also participated in the development of this plan. As a result, the resource requirements outlined in the plan were known to the Board and the principal owner as the plan evolved. A draft was circulated to the USU community for feedback and review and was also reviewed and revised by the full Board. This was followed by a penultimate draft, also reviewed by the entire USU community. Upon approval of the plan by the Board of Trustees, operating departments at USU will develop specific annual operating plans linked directly to the plan.

**How progress on the plan will be assessed**

On a quarterly basis, the administration will provide the BoT and the community with an institutional “checkup,” assessing progress toward the goals and objectives of the plan. Beginning in 2015, USU will add an annual Assessment Summit to its calendar. At the summit, all departments in the institution will come together and report on their progress. A sample assessment calendar is presented in a table below

**USU Preliminary 2015-2016 Assessment Calendar**

<b>Date</b>	<b>Assessment Activity</b>	<b>Outcome</b>	<b>Participants</b>
Early March	1 <sup>st</sup> Annual Assessment Summit	2014 goals and performance assessment; annual assessment report developed.	President, Leadership team, Faculty (including Faculty Senate members), staff
April BoT Meeting	President reports on Summit and presents annual operating plans.	Operating plans reviewed, goals and objectives reaffirmed or adjusted; next year milestones approved.	President, BoT
Weeks of May15, July 15, Oct.,15, Jan.,15	Quarterly Assessment workshops	Each department presents quarterly assessment report, identifies gaps to goals; recommends remediation	President, Leadership, Faculty. Faculty Senate, staff. BoT updated at

		activities.	July, Oct., Jan. meetings.
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At the end of each assessment year, overall progress will be reviewed and the plan will be adjusted as needed to reflect prior year activity. Existing goals and objectives will be reviewed and possibly altered or extended. New goals/objectives may be established, and the current plan extended for an additional year, with the 2015-19 plan becoming the 2016-20 plan, and the process continuing in future years. This process will provide planning continuity and the opportunity to respond in real time to WSCUC’s legitimate concern that institutions consider the “changing ecology of higher education.”

**Other considerations related to plan development**

Over the past two years, the institution has made significant progress improving its balance sheet. Enrollments and revenue have improved and losses have decreased. However, at the end of 2014, the institution had not yet reached a break-even point. Despite these losses, the institution’s principal owner has continued to invest heavily in initiatives to improve academic quality and educational effectiveness and in software systems that facilitate data collection, enhance the quality of student services and improve the institution’s approach to enrollment management.

In April 2015 USU anticipates that its Master of Science in Nursing (MSN) program submitted for accreditation with the Commission on Collegiate Nursing Education (CCNE) will be approved. On May 31, 2015, the university will be relieved of its lease obligation on the property in Cypress which will positively and immediately impact its balance sheet.

Also in April 2015, USU will host a WSCUC Visiting Team. The outcome of this visit is critical to the future success of the institution. If USU is not successful in having its “accredited, on probation” status removed in June 2015, its domestic and international enrollment activities will continue to be negatively impacted, and its ability to sustain itself will be jeopardized. Cognizant of all of these factors, the sustainability goals and objectives in this plan are the institution’s highest priorities in 2015 and 2016. Increasing enrollments and generating revenue are of the highest importance in the early stages of this plan.

## **Plan alignment with the mission**

Mindful that “continual disruptive change” is changing the landscape of higher education with increasing velocity, the institution engaged in an environmental scan of changes in population and student demographics, labor demands and employer workforce education expectations, and competitive forces. These data also informed the development of the strategic initiatives contained here.

In its 2013 Policy Insights “Demography as Destiny: Policy Considerations in Enrollment Management,” the Western Interstate Commission for Higher Education (WICHE) describes the current pressures facing postsecondary institutions thusly:

...postsecondary institutions are being asked to graduate more students with credentials that have value in the labor market at a reduced cost per student, while serving a diversifying student body less likely to arrive on campus fully prepared academically for college and with limited financial resources to pay for it, all with negatively impacting educational quality. It is a daunting set of challenges.

Daunting indeed, but United States University and its faculty, staff and board members see opportunity in these challenges. Its small size and its vision, mission and values well position the institution to respond to these challenges and make a measurable difference in the lives of the students it serves. The strategic directions and initiatives outlined in this plan are designed to align market needs with the mission of USU, which reads as follows:

**United States University provides professional and personal educational opportunities, with a special outreach to underserved groups. Through campus and online courses, the University offers affordable, relevant, and accessible undergraduate and graduate degree programs and certificates in a supportive, student-centered, learning environment.**

## **Key considerations underlying planning assumptions**

In a crowded marketplace with intense competition for students, the USU community gave careful thought to the characteristics and qualities that differentiate the institution and whether or how these characteristics might be leveraged to create some strategic advantages. Additionally, USU reflected on the following critical questions and used these questions to shape its data analyses:

## **Who Do We Teach?**

The mission calls for USU to provide educational opportunities with a special outreach to underserved groups. The question to be answered was whether this need continues to exist in USU's local market and if so, how does USU expand its marketing reach?

## **What Do We Teach?**

Do the workforce needs of employers align with USU's institutional outcomes?

## **How Do We Teach?**

Intentionally, USU hewed to small class size and embedded the small class size model in the professional orientation of its faculty. It had not examined whether the recent research supported this approach as one that would ensure student success, and more importantly, did student feedback from domestic and international students confirm that small class sizes helped them to succeed?

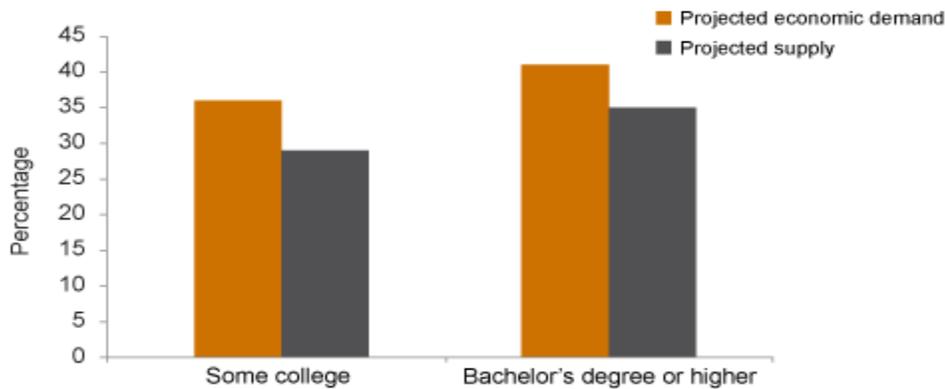
## **Who We Teach: Population trends and student demographics**

In formulating a sustainable strategy, USU needed to consider the needs of future students and the social trends that portend market gaps in higher education services. This included identifying growing, underserved communities where there is student demand for USU programs of study and required an overall assessment of demand for higher education programs in the domestic and international markets.

### **Domestic market demand**

Although demand for individuals educated at the postsecondary level is not diminishing, supply is, and this change is linked to changes in high school graduation rates. The Public Policy Institute of California described the gap this way:

By 2025, California is likely to face a shortage of workers with some postsecondary education but less than a bachelor's degree. In fact, the future gap among "some college" educated workers may be as high as 1.5 million— even larger than the projected one-million-worker shortage of college graduates. The projected shortage of educated workers with some college stems from a mismatch between the share of the workforce projected to have some college education by 2025 (29%) and the share of jobs that will require workers with those skills (36%, Figure 1).



“California’s Need for Skilled Workers” Public Policy Institute of California (September 2014)

According to WICHE and its 2012 update to *Knocking at the College Door: Projections of High School Graduates, California*,

“Hispanic public high school graduates are the only racial/ethnic group projected to grow in meaningful numbers, up 28,000 by 2019-20 (19%)... [and the number of] Asian/Pacific Islanders high school graduates “will hold steady at between 54,000 and 58,000 graduates through 2022-23.”

Both Asian/Pacific Islanders have low degree attainment rates with Hispanics having the lowest degree attainment rates of any ethnic group. In addition, the WICHE report identifies two major barriers to success for Hispanic students:

1. low composite scores on the National Assessment of Educational Progress (NAEP) math and reading scores for eight graders (2011)
2. lack of financial resources. Hispanics are the least well off financially among all races/ethnicities with a median income that is two-thirds of the statewide median.

In the early 1990s in California, Clark Kerr and others predicted Tidal Wave II -- the children of the Baby Boomers who would graduate from high school in record numbers from about 1998 until 2010. This surge of high school graduates was projected to create great demand for higher education, and indeed they did. Today, that tidal wave has subsided. According to WICHE, “production [of high school graduates in California] will fall by over 37,000 (a 9% decline), after which it will continue to decline, though inconsistently and at a more modest pace, through 2020-21.”

In addition to the shortfall in the number of high school graduates, recent studies suggest that the demand for skilled labor, particularly college-educated labor, will

outpace its supply. According to *California Counts*, a publication of the Public Policy Institute of California:

To some extent, this is because population groups with historically lower levels of postsecondary educational attainment are growing faster than those with higher levels. Enrollment and graduation rates must increase among Latinos and blacks, in particular, if California is to meet the workforce needs of its employers.

The 2014 graduates of United States University self-reported the following regarding their ethnicity: 25 percent Hispanic; 13.1 percent Asian; 21.8 percent Black/African-American; and 4.2 percent Hawaiian/Pacific Islander. These graduation rates suggest that USU already has an affinity for Hispanic and other minority groups identified for their high growth potential and aligned with the mission and vision of USU to reach out to underserved populations.

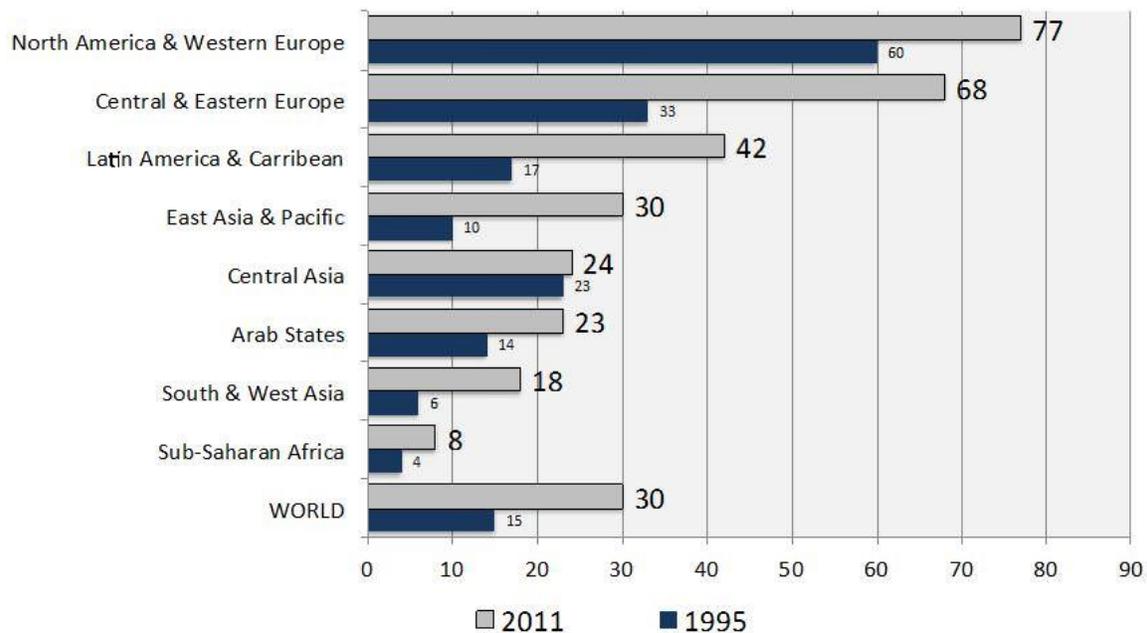
### **International market demand**

International students provide USU the opportunity to extend its mission to more underserved populations and to foster a globally conscious, diverse and engaged community. This is also an important component in achieving fiscal sustainability. Non US enrollments provide non-title IV revenue and provide USU with the potential to significantly increase its number of students in both the short- and long-term.

As important to the USU learning is the international influence and global mindset created in classrooms with domestic and international students, enhancing the marketability of both groups.

According to a 2014 UNESCO funded research report, *The Social Implications of High Participation Higher Education Systems*, the global gross tertiary enrollment ratio (GTER), and the percentage of the tertiary-aged population enrolled in higher education more than doubled over the past 20 years from 14 percent in 1992 to 32 percent in 2012.

This compares to an increase of 4 percent in the 20 years before 1992.



**Source: UNESCO, The Social Implications of High Participation Higher Education Systems (updated 1995, 2011, 2014, 2015)**

The UNESCO data not only show the impressive growth in international student participation in higher education, but also accentuates the closing gap between North America/Europe and the rest of the world with regard to participation rates. According to Dr. Simon Marginson, professor of international higher education at the University College London Institute of Education and primary author of the report, “the rise of an aspirational middle class in developing countries, particularly China and India, will also further fuel participation rates, with the global GTER set to exceed 50 percent by 2025.”

These students are not just participating in higher education in their home countries, but leading an explosion in international student enrollments according to OECD and UNESCO trend lines extrapolated in a 2014 report by Geoff Mason, *Mass Movement of the Worlds Students*:

Nearly five million international students are likely to be studying for degrees outside their own countries this year in what has become one of humanity’s great mass movements. Since 2000, when 2.1 million students left home to enroll in a foreign college or university, the number has increased by a staggering 140%, an average of 10% every year. According to the most recent (2011) statistics, the United States attracts the most foreign students with 16.5% of the total enrolled overseas.

International students coming to the US also find USU's San Diego location to very appealing. According to the Institute of International Education and US State Department's 2014 Open Doors® Report on International Educational Exchange, California continues to be the top destination for foreign students pursuing higher education in the United States. According to that same report, San Diego accepts the third-largest number of international students in California behind Los Angeles and the San Francisco bay area.

Furthermore, USU's program emphasis on health sciences and business education are attractive to prospective international students. According to an August 29, 2014 Brookings Institution Report, *The Geography of Foreign Students in U.S. Higher Education: Origins and Destinations*, two-thirds of foreign students studying for a bachelor's or higher degree in the United States are pursuing a STEM or business degree.

### **What We Teach: Meeting employer workforce education expectations**

Sustainable strategic goals must be aligned with employers' education workforce demands if students are to be professionally successful. According to the National Association of Colleges and Employers (NACE) *Job Outlook for the Class of 2014*, the attributes employers seek of graduates included: leadership, teamwork, written communication skills, problem-solving skills, work ethic, analytical/quantitative skills and initiative. The 2014 NACE Outlook also provided a list of the skills preferred by employers:

- Working in a team structure
- Making decisions and solving problems
- Verbally communicating with persons inside and outside the organization
- Planning, organizing, and prioritizing work
- Obtaining and processing information
- Analyzing quantitative data
- Possessing technical knowledge of the job
- Possessing proficiency with computer software programs
- Creating and/or editing written reports
- Selling and influencing others

The NACE skills preferred by employers are exceedingly well aligned to United States University's institutional learning outcomes which are to:

1. Communicate clearly and effectively through writing, speaking and using technology.
2. Apply quantitative reasoning to address complex changes.
3. Effectively gather, analyze and integrate information on a variety of sources.
4. Apply critical thinking in the research and problem-solving processes.
5. Demonstrate ethical reasoning and actions to provide leadership as a socially responsible citizen.
6. Work effectively across race, ethnicity, culture, religion, gender, and sexual orientation.
7. Work collaboratively as members and leaders of diverse teams.
8. Exhibit mastery of knowledge and skills within a discipline.

The USU community believes that the congruence of the NACE employer survey data and its institutional learning outcomes can be leveraged to strategic advantage and provide a competitive advantage in attracting new students. Going forward it will be important for USU to collect appropriate student data related to the achievement of institutional learning outcomes (ILOs) and to continue to calibrate student data on ILOs with employer workforce education expectations. The institution will create professional advisory groups to ensure ongoing program relevancy and explore a new initiative in creating coding/data literacy across the curriculum.

### **Continued focus on health sciences**

USU has a large portfolio of health sciences programs so an examination of the socio-economic data related to this field was prudent and necessary to determine how these programs may fit into the future of USU.

A May 2013 University of California publication titled *A New Era of Growth: a closer look at recent trends in health professions education*, describes the current challenges in health care as follows:

California is the largest and most ethnically diverse state in the nation. Home to an estimated 37 million residents, the challenges linked to providing health care services are both complex and long-standing. . . According to the 2010 Census, of the state's residents, 40 percent are non-Hispanic white, 38 percent are Hispanic, 13 percent are Asian, 6 percent are African American, 3 percent are

multiracial and approximately 1 percent are American Indian.” Yet, this diversity is not reflected in its health professions workforce. Latinos, African Americans and Native Americans are significantly underrepresented among health professional students, faculty and clinically active providers throughout the state. Improving the diversity of the workforce is an important strategy for improving health outcomes. According to the Institute of Medicine, diversity in the health workforce is associated with improved access to care for racial and ethnic minority patients, greater patient choice and satisfaction, and better educational experiences for health professions students, among many other benefits.

[Source: The Center for American Progress report “A New Era of Growth: a closer look at recent trends in health professions education” May 2013]

Clearly there is growing need for healthcare professionals from underserved populations, and USU is well ahead of other institutions in meeting this need. In its 2014 Fall II term, the institution’s Master of Science in Nursing (MSN) program had 64 students: 22 were Hispanic, 5 were Black/African American and 19 were Asian. The RN to BSN program had 16 students enrolled of which five were Asian, three were black and two were Hispanic. In the Bachelor of Science in Health Science there were 74 enrolled students. Fourteen were Hispanic and 21 were Black/African American Health Sciences. Because USU enrollment demographics mirror more closely than many institutions the demographics of California, it is well positioned to leverage this strategic advantage that flows from its mission. The USU community believes its brand could resonate well in such underserved communities, creating competitive advantage.

### **How we teach: “The Power of Small”**

Because small class size and individual attention to student needs are in the DNA of the institution and because USU also wishes to increase its average class size from 7 to 8 students per class to a more optimal level of 13 to 15 students per class, the institution has carefully examined the current research on class size. It is no surprise that class size does matter:

Small classes...better student preparation, student enthusiasm, and effort than those in large and very large classes...the smaller the class the higher was students’ achievement and overall impressions of the course.... Smaller classes were especially well suited for developing students’ creative capacities and oral and written communication skills. [Benton, S. (2012). Does Class Size Matter? Blog. Analyses of IDEA student ratings collected in 490,196 classes from 2002-2011]

Research indicates that “increasing class size [has] a negative effect on student achievement and retention. A student with an average class size of 20 had a 0.97 probability of returning to the university, whereas a student with an average class size of 240 had a probability of returning of only 0.80.”

**[Keil, J. and Partell, P. J. The effect of class size on student performance and retention at Binghamton University. Office of Budget and Institutional Research, Binghamton University.]**

And a 2010 study at Cornell University found “that both class size and student load negatively impact student assessments of courses and instructors... large class sizes and higher student loads are correlated with less critical and analytical thinking, less clarity in class presentations, and lower ratings on the instructor’s ability to stimulate student interest.”

**[Monks, J., & Schmidt, R. The impact of class size and number of students on outcomes in higher education. Working Paper, Cornell University, School of Industrial and Labor Relations.]**

The USU community is convinced that much success can be achieved by maximizing the value that is embedded in being a small institution. Internally, this is sometimes referred to as “The Power of Small.” Retention and graduation -- two key markers of student success are easier to accomplish in a more personalized educational environment. Smaller classes are a powerful recruiting tool for faculty. Students are more easily able to have their problems resolved or to access campus services.

## **The Strategic Directions**

The University has three overarching strategic directions: Sustainability, Quality and Accessibility. Each direction has an overarching goal and specific priorities to achieve the goal. Each priority has targets, milestones, timelines, resource considerations, and lines of responsibility. The quarterly assessment reports and Assessment Summit inform decisions which inform budget development and resource considerations thereby ensuring a continuous and closed loop.

### **Strategic Direction One: Sustainability**

#### *Sustainability Overarching Goal*

By 2017, USU will generate revenue sufficient to sustain and increase the quality of its educational activities, and provide adequate return on investment to ensure business continuity.

#### **Priority 1.1 Increase Domestic Enrollments**

USU will grow domestic enrollment by reaching out to the underserved communities closest to its campus and the South Bay region. This will be accomplished by deepening relationships with key local constituencies including the military and predominantly Hispanic communities. According to the most recent data available on the California Competes website, college attendance rates for the four zip codes immediately south of USU range from 15 to 32 percent.

**Target:** By 2016, Increase domestic student enrollment by 500 students. By 2020 have 1,500 students enrolled.

**Milestones and Timeline:** Complete a local market study in early 2015 to identify specific entry points and potential partnerships with the underserved communities in the city of Chula Vista and the South Bay. Create a transition program in 2015 to attract and prepare underserved Hispanic students for higher education.

**Resource Consideration:** 2015 milestones can be completed within the existing budget. Future year expenditure will be funded from excess cash generated from

student growth in 2015 which is projected to be modest. There may be an additional marketing investment required but advertising spends will not exceed the 2015 budget.

**Responsible Parties:** The Vice President of Marketing and Director of Admissions will take the lead in developing and launching this priority. The Hispanic college preparation and transition program will be led by the Provost.

### **Priority 1.2 Expand International Enrollment**

International student enrollment helps USU improve its diversity, provides expanded access to education to students from developing countries, and contributes positively to fiscal sustainability. Given the current limited resources available to the USU community, we plan to increase international enrollment by leveraging student recruiting agents.

**Target:** 500 international students enrolled by end of 2016; 1,500 students enrolled by 2020.

**Milestones and Timeline:** By 2016, have at least 25 active international agent recruiters providing at least 1,000 student applications annually. Increase this number to 100 active agents with 5,000 applications per year by 2020.

**Resource Consideration:** International students pre-pay tuition for their first full semester. This source of cash will be used to fund hiring additional staff and pay for marketing efforts that support this priority. It is envisioned that new student services will need to be created to assist new, international students with their unique needs for matriculation and enculturation.

**Responsible Parties:** The Vice President of International Development will lead this priority, with support from the Director of Admissions and the student services functions.

### **Priority 1.3 Decrease Student Acquisition Cost**

Lowering student acquisition costs frees up funds that can be repurposed to improve program quality and services. Over time, USU will lower its cost to acquire US, domestic students to \$1,500 by improving and expanding its organic marketing efforts.

**Target:** Keep student acquisition costs below \$1,500 per student by 2018.

**Milestones and Timeline:** Launch a student referral program in 2015 providing eligible scholarships to eligible students who are referred by faculty, staff, current students and alumni. Participate in 24 local student events in 2015; expand by four events per year through 2020. Expand organic lead generation efforts online by shifting resources from paid leads beginning in 2015.

**Resource Consideration:** Funding for local event participation will be funded by cost savings achieved through reducing spending on paid leads and shifting budgetary resources into organic marketing events. If organic lead generation online requires additional funding in 2015 beyond what can be provided from shifting these budgetary resources, a maximum additional, unbudgeted expenditure of \$75,000 may be required before organic lead generation becomes self-sustaining

**Responsible Parties:** The Chief Financial Officer, working with the VP Marketing and the Director of Admissions will lead this priority.

#### **Priority 1.4 Maintain a stable, long-term annual growth rate**

Beyond the next three years, USU will need to develop a pipeline of growth opportunities to ensure steady long-term growth and provide lasting financial feasibility. This will be accomplished exploring new opportunities and incubating them over the next five years.

**Target:** Maintain a five percent annual growth rate or better beyond 2020.

**Milestones and Timeline:** Create a growth pipeline project feasibility and evaluation process in 2015. Begin exploring new expansion opportunities in 2016 including a campus in Mexico, a Philippine campus expansion, business-to-business enrollment programs, and increased military outreach.

**Resource Consideration:** These growth projects shall typically be funded by excess cash as USU grows over time. However, for exceptional opportunities, funding may be forthcoming with prior approval.

**Responsible Parties:** The President shall, at her/his discretion, launch feasibility studies into new growth ideas and assign community members to support and

contribute to those studies. The CFO will have primary responsibility for creating and vetting the financial forecasts for these studies.

### **Priority 1.5 - Maintain Healthy Financial Performance**

USU needs to carefully monitor its operating performance to ensure that it achieves operating cash flows that support reinvestment in student service improvements, improve fiscal sustainability, and fund USU growth plans.

**Target:** 15 percent annual return on invested capital as calculated as a pro rata monthly run rate beginning in December 2016. Maintain five percent year-over-year EBITDA growth each year thereafter.

**Milestones and Timeline:** Begin completing a monthly performance dashboard in 2015 showing key financial ratios and student outcomes that helps ensure financial decisions benefit student outcomes and improve financial sustainability. Hold monthly meetings with senior staff to analyze trends in the dashboard and identify areas of improvement.

**Resource Consideration:** No additional financial resources required. However, as the dashboard expands in scope, a part-time resource may be required to assist the CFO in preparing the monthly reports.

**Responsible Parties:** The CFO shall prepare the monthly report, and the President shall lead the monthly dashboard review with USU senior leadership team.

## **Strategic Direction Two: Quality**

### *Quality Overarching Goal*

By the end of 2017, USU will be known in the San Diego area for providing a quality, student-centered educational experience that prepares students to live, work, and lead in their communities. By 2020, USU will be recognized in select markets in the global community for the same values.

### **Priority 2.1 Match or Exceed Peer Institutions for Student Retention**

The USU mission and vision cannot be accomplished if students do not move through their studies to graduation. In 2015, USU will have its first four year, cohort graduation rate in 2015. Once known, the institution will implement student support initiatives to increase its retention rate year-over-year with the goal of exceeding the average retention rates for comparable institutions in the San Diego area.

**Target:** Achieve above-average standards when compared to universities of similar demographics and population.

**Milestones and Timeline:** In 2015, create a Retention Committee comprised of students, faculty and staff. The Committee will complete a study that identifies the top three reasons USU students drop out. The study will also provide recommendations to improve retention processes and intervention measures at USU. Implement these recommendations in 2016 to increase the undergraduate 4 year/2 year (depending on duration of program) graduation rate by 1 percent each year, as measured by IPEDS, for the next five years.

**Resource Consideration:** Additional expenditures related to student service expansion to support this will be made in 2016 after the conclusion of our task force results and

**Responsible Parties:** The Provost and Vice President of Compliance and Regulatory Affairs will chair this initiative. The Director of Financial Aid will also participate.

### **Priority 2.2 Optimize Class Size for Student Success**

Class size is known to be a factor in the quality of educational interactions and outcomes, as well as an important factor for sustainability. However, excessively small class sizes impede academic quality and limit interactions. Excessively small class sizes also raise the cost per student for education delivery and impair efforts towards financial sustainability. It is essential that USU grow its average class size to improve student interactions and improve its finances without losing its core commitment to “the power of small” as a factor in student success.

**Target:** By 2018, target an average class size of no less than 13-15 students and maintain this range year over year.

**Milestones and Timeline:** In fall 2015, form a committee of faculty and staff to review student scheduling procedures and make recommendations on how to best achieve optimal class size of no more than 15 students. Begin implementing quick-win, low cost initiatives in 2016, expand to more resource intense initiatives in 2017.

**Resource Consideration:** By focusing on low cost initiatives in 2016, USU will self-fund this priority in the first year within its current cost structure. However, with expansion and growth in the out years, USU may reallocate additional funds to this priority.

**Responsible Parties:** The Director of Information Technology and the Chief Academic Officer/Provost will co-chair the committee and select additional committee members from the faculty and staff to participate.

### **Priority 2.3 Develop Regionally Recognized Centers of Excellence**

Recognition for excellence in academic programs reflects academic success, assists students in their professional goals, and strengthens student and faculty recruiting. USU will create centers of excellence in programs of study aligned with the needs of underserved communities and its mission.

**Target:** Create regionally recognized centers of academic excellence by end of 2019:

1. Nursing: excellence in bilingual health care providers with a patient-centered approach to health care ;
2. Business: excellence in international business skills, online marketing, entrepreneurship in companies with 200 employees or less;
3. Education: excellence in multicultural classrooms, STEM and educational technology.

**Milestones and Timeline:** Form a Provost's Action Committee in 2015 for each area of excellence to be made up of USU faculty, students and staff. The committee will evaluate the resources available to the program and recommend an

action plan for each area of excellence that includes achievable projects and goals within the resource constraints of the program. The Provost will also engage with a credible third-party to implement a nationally recognized STEM Teacher Certification program by the end of 2016.

**Resource Consideration:** a portion of the revenues from the STEM Teacher Certification program will be used to fund resources needed by the three committees. A partnership with outside venture and angel investors will also be evaluated for the purpose of business programs targeting entrepreneurship.

**Responsible Parties:** The Provost and Director of Administration and Human Resources will coordinate and lead this priority.

#### **Priority 2.4 State Average or Better on Certification Exams**

For students, quality improvements must translate into improved performance in attaining professional certifications that are required in their fields of study. USU will prepare students so that each class of students will perform on average better than their statewide peers on the same professional and/or certification exam.

**Target:** The average cohort pass rates for all professional and certification exams will exceed statewide averages by the end of 2016.

**Milestones and Timeline:** By the end of 2015, each academic department will provide to the Provost its plan to achieve this priority by the end of 2016. Their action plan will include a list of changes made to their curriculum and pedagogy to ensure student exam success as well as methods of measurement and reporting to ensure that accountability for this priority will be consistent and fair.

**Resource Consideration:** Additional resources may be required in 2016 to achieve this goal. Until each academic department provides their standards and plans to exceed them, it is difficult to forecast the resources required for this priority.

**Responsible Parties:** - Deans of each academic department shall be responsible to present their action plan to the President, Provost and CFO of USU.

## **Priority 2.5 Excellence in Academic and Operating Feedback Mechanisms**

Receiving, assessing, and acting upon feedback are integral to USU's mission and vision. USU will require that its community achieves "top two box" averages in survey data related to student satisfaction with academics, student services and financial aid. USU will also achieve "top two" box averages in faculty and staff surveys related to career satisfaction.

**Target:** By the end of 2016, achieve an average survey in the top quartile for all student service and faculty/staff satisfaction surveys using an eight point scale (no average score permitted).

**Milestones and Timeline:** Form a faculty committee to create an updated student satisfaction survey for academics, student services, and financial aid by the end of 2015. Form a staff committee to create an updated administration and staff satisfaction survey by the end of 2015. Implement the new surveys in 2016 and achieve target performance in each area by the end of 2016. Form project teams from the university community to recommend changes and improvements for areas of weakness that fail to meet the targets in 2015. By 2016, the Provost will prepare a budget request to provide opportunities for 100 percent of full-time faculty with one year or more of service at USU to attend a professional development program or attend a research conference each year in their area of expertise.

**Resource Consideration:** There will be a negligible cost for creating the surveys and managing them from a third-party online provider. However, the cost of professional development and/or research conference attendance will require sufficient budgetary gains that depend on other priority areas of success for funding.

**Responsible Parties:** The Director of Administration and HR will coordinate this priority working closely with the Provost and Director of Information Technology.

### **Priority 2.6 Absolute Compliance**

Quality programs cannot be achieved without perfect compliance with our legal and accreditation obligations. USU will be 100% compliant with all federal and state regulations in every area of university life.

**Target:** 100% compliance for every academic, federal, and state regulation is an absolute requirement.

**Milestones and Timeline:** Conduct an annual review of all regulatory areas at USU. This report shall be completed and submitted to the Board of Trustees within 90 days of the end of the calendar year beginning in 2016 for the 2015 year.

**Resource Consideration:** It is expected that this compliance review will take time for each department to complete a compliance questionnaire and any audits performed by the review team.

**Responsible Parties:** The CFO and Vice President of Compliance and Regulatory Affairs will jointly lead this priority.

### **Priority 2.7 Excellence in Curriculum Improvement**

Improving curriculum to maintain NACE and state-of-the art professional skills is essential to providing quality education. USU will maintain curricula that challenges and inspires its students to learn, prepares them for their professions, and provides them with the most current information and research available in each course of study. The Academic Summit will also be the venue for the display and discussion of student data related to the achievement of institutional learning outcomes (ILOs) and the continued calibration of student data on how USU ILOs match up with current employer workforce education expectations. The institution will create professional advisory groups to ensure ongoing program relevancy and launch a new initiative in creating coding/data literacy across the curriculum.

**Target:** Conduct an annual Academic Assessment Summit and implement changes in curriculum based upon summit outcomes.

**Milestones and Timeline:** USU will conduct continuous curriculum review and improvement through benchmarking formal curriculum reviews, PAC committee

input and culminating in the annual academic assessment summit hosted by the Deans and Provost.

**Resource Consideration:** It is likely that this priority will require hiring at least one additional Institutional Researcher in mid-2016 to implement recommendations that emerge from the summit process.

**Responsible Parties:** The Provost and Deans will coordinate this priority.

### **Strategic Direction Three: Accessibility**

#### *Accessibility Overarching Goal:*

By the end of the second quarter in 2017 USU will provide its students with comprehensive access to quality learning in all modalities, meaningful student services, and efficient access to information.

#### **Priority 3.1 Provide Career Services**

Employment outcomes are one of the foremost concerns students have when choosing a university and their course of study. To improve student access to their preferred professions, USU will begin providing career services to its students and alumni. In the short term, this will include resume, cover letter, interview and job search training and expand in the long-term to provide expanded on-campus recruiting and a database of active job leads online for students and alumni.

**Target:** Launch career services by end of 2015, expand services each year for three years thereafter including resume, cover letter, interview and job search training that is aligned with academic advising and career development.

**Milestones and Timeline:** Launch basic services by the end of 2015 and have student career service advisors trained and working with students by the same time. By the end of 2016, include integrated online job application system partnered with business and industry to strengthen career readiness aligned with curriculum content and experiential opportunities. In 2017, launch student career council comprised of selected students and area employers to propose innovative ways to connect students to employers and engage the full campus community in career preparation for students as well as ongoing career support for alumni.

**Resource Consideration:** Additional financial resources will be required for the initial launch; however, sufficient operating cash flow should exist by 2016 to cover incremental expenses related to program growth. It is anticipated that no fewer than two student career advisors will be trained and share rotating responsibilities to assist students and alumni with resume and cover letter creation as well as job interview preparation.

**Responsible Parties:** The Director of Administration and HR will lead this initiative and work closely with the Provost to ensure the linkage between academic work and the career development process.

### **Priority 3-2 Reorganize and Expand Alumni Association**

An active alumni association expands student access to seasoned mentors as well as prospective employment and social opportunities. In return, alumni receive expanded access to prospective employees and strengthen the USU community. USU will reorganize its alumni association and host events to strengthen the alumni community and expand and deepen current student interactions with alumni.

**Target:** 35 percent of graduates to join alumni association at graduation. Five percent of alumni make a donation to the Student Emergency Fund.

**Milestones and Timeline:** Launch alumni website by June 2015 and create an alumni committee to lead the alumni association by the end of 2015. Begin hosting annual alumni weekend in 2016 with specialized events for graduates from each school. Solicit donations from alumni, 100 percent of which will go into a fund to support students with emergency financial needs. Target the first disbursements from this fund to students in need during 2016.

**Resource Consideration:** A temporary resource will be needed to help coordinate and set up alumni week events. The CFO will establish and reconcile a separate bank account for the emergency fund that will be managed and controlled by the alumni committee as an independent, non-profit organization.

**Responsible Parties:** The Director of Administration and HR and the CFO will jointly lead this priority.

### **Priority 3.3 Expand International Exchange Opportunities**

Opportunities for study abroad expand access to global learning for both outbound and inbound students as well as faculty and staff. USU will increase its international exposure through additional articulation agreements with international partners.

**Target:** Add two new international articulation agreements each year with international institutions that have accreditation on par with regional accreditation in the United States.

**Milestones and Timeline:** The Provost and Vice President, International Development, will jointly coordinate their efforts to target new international partnerships via faculty and staff recommendations as well as inquiries from institutions abroad. It is expected that USU will complete two new international articulation agreements each year, and target one of those agreements with a country that USU has no prior agreements with any of their domestic institutions.

**Resource Consideration:** Additional travel budget may be required for campus visits and academic reviews required in the process of vetting new partners. The impact of this may be minimized by coordinating prospective partner visits with scheduled travel plans already in place for the Vice President, International Development.

**Responsible Parties:** The Vice President, International Development and the Provost shall jointly coordinate this priority.

### **Priority 3-4 - Improve Technology Access**

Access to technology can be a significant barrier to higher education in many underserved populations. In overcome these barriers, USU will expand technology access and make ongoing improvements to the user interface for all student services, academic delivery models, financial aid, and student campus life.

**Target:** Ensure that all students have access to a laptop to complete their work by end of 2015 and complete ongoing user interface improvements each year to ensure students can maximize their use of technology resources available from USU.

**Milestones and Timeline:** By the end of 2015, provide “loaner” laptops to students in the student lounge that may be checked out for completing school work or taken to class as needed. In 2015, establish a Student Technology Council that allows select students to provide input and suggested improvements for the various user interfaces and online services provided by USU. Faculty and staff will work with the committee to solicit ongoing student recommendations for improvement and identify/create unique services for students using and expanding campus technology.

**Resource Consideration:** For reworking user interfaces, contract web-developers will be used and require incremental resources beginning in 2016 to implement some of their suggestions. The laptops for students are already budgeted for purchase in the first quarter of 2015.

**Responsible Parties:** The Director of Information Technology will lead this priority.

## **Conclusion**

Every member of the United States University community understands how important this strategic plan is to the institution’s future. The initiatives contained in this plan will, once established, advance USU’s reputation in San Diego, California and abroad, expand USU’s outreach locally, nationally and internationally, and most importantly secure financial sustainability for the institution.

This is not an aspirational plan. All of the objectives are achievable though they will require the continued commitment and effort of the entire community. In the process of USU developing this plan, the community discovered that even as the world of higher education becomes more complex and more competitive, the basic axioms upon which United States University was founded still matter greatly.