March 1, 2012

To All Saint Leo University Faculty and Staff:

The Strategic Planning Committee met in December for our annual planning retreat. As in previous years, Paul Bradley, Ph.D., president of the Bradley Group, facilitated the meetings. We continue to use Paul’s “planning funnel” to give structure to our planning. As always, the University’s mission and core values provided the foundation and guidance for every consideration and decision during our planning retreat. All of our work for two days was directed to advancing the University towards our vision. Thus far, our progress is excellent, but much remains to be done to achieve the greatness to which we aspire.

Our Strategic Plan must draw the roadmap to achieve our vision of becoming a leading Catholic teaching university of international consequence for the 21st century. We began our meeting with an examination of the legacy of the late founder of Apple, Steve Jobs. We know that Jobs was a visionary who began with a small idea and developed it into one of the world’s most successful business enterprises. Jobs’ approach was relatively simple: “do whatever it takes to please the customer.” He also pursued a mission to change the world with an uncommon passion and thousands of Apple employees did likewise. Jobs also realized that good ideas take time and that critical to the organization’s ultimate success was faithfulness to the vision. For Saint Leo University, it is always important to be reminded of the importance of our commitment to our mission, values, and vision and of our steadfast pursuit of vision.

The Strategic Planning Committee applied Steve Jobs’ lessons to Saint Leo University. We asked: What can we do to further delight our students? What good ideas are we working on that require patience and time? What mistakes have been made that we
should learn from—and how? What are our passions that will help us build the not-for-profit university of the 21st century that will last beyond us?

The committee also examined our “theory of the business,” (Drucker) and did a reality check to make sure the Strategic Plan is sound and on target, but capable of modification when necessary.

The committee then re-examined the plan using the planning funnel. We specifically reviewed our Key Success Factors and our assumptions on which the plan is based.

The Strategic Planning Committee held true to three critical duties throughout the meeting:

1. **The Duty of Loyalty** indicated by honesty, confidentiality, and the commitment to act in the best interests of Saint Leo and not just one’s individual department or unit.
2. **The Duty of Care** indicated by prudence, diligence, clear processes, open dialogue, and the use of expertise and data to make informed judgments.
3. **The Duty of Candor** indicated by active listening, honest discussions and dialogue, no passive dissent and concerns that are fleshed out by the group to achieve consensus.

**Key Result Areas (KRA’s)**

During the Planning Process we honestly assessed where we are, reviewed our vision of where we want to be, and asked how will we get there. Consequently, we began our two days with me reviewing Saint Leo University’s accomplishments, circumstances, and challenges this year, next year, and beyond. We then reviewed our progress on the 2011-2012 Key Result Area action plans that the Strategic Planning Committee set one year earlier. On the second day of our planning retreat the KRA’s for 2011–2012 were reviewed and the KRA’s were set for the 2012–2013.
Each captain of the KRA teams for 2011-2012 presented an update on their progress, and the committee discussed each KRA in turn. A brief summary of those reports follows:

**Improving Teaching Pedagogy (Teaching Our Best to Bring About Their Best)**  
– Maribeth Durst, Captain

The KRA to improve teaching to students in all Saint Leo student constituencies addresses issues of consistency in teaching, improving faculty development for both full-time and adjunct faculty, and establishing benchmarks to assess our improvements made good progress over the past year. The appointment of a Director of Adjunct Faculty Relations, Susan Shoulet, has made an immediate impact on the content and quality of communication with adjunct faculty members at all locations. The Academic Affairs Faculty Resources web page was improved and the Academic Affairs Statement of Preferred Pedagogy revised. Several other initiatives were started by the Office of Instructional Design to improve pedagogy including: workshops on pedagogy, lunch and learn sessions, live faculty workshops, collaborative webinars, NBC Learn webinars, and one-on-one just in time sessions. The in-class observation process was improved and all faculty identified as “needing improvement” must complete professional development plans. These efforts have been very well received and feedback documents that the faculty strongly agree such efforts will help improve their teaching. More faculty development workshops will be offered to showcase teaching methods and to provide more information on learning styles. A new Faculty Development Training course will be developed on “Embedding Critical Thinking in Your Teaching” along with demonstration videos on effective teaching and teaching adult learners for faculty at the centers.

**Student Success (Campus Retention)** – Ed Dadez, Captain

This KRA has incorporated in two other KRA’s from last year, “Enhancing Programs for New Students” and “Academic Advising (Can You Hear Me Now?).” The action plan will focus its efforts primarily on students at the University College campus who have been identified as “at risk” and will work with them to improve their chances of student success. The plan will look at students’ fit at Saint Leo, faculty and staff, campus facilities, and campus programs. The primary focus will be on students and
students’ success. The KRA will carry over into the coming academic year and beyond. It is not a short-term effort.

Achieving International Consequence (Globalization) – Mike Nastanski, Captain

The primary goal of this comprehensive KRA is to ensure that “…all Saint Leo students, in all locations will graduate from Saint Leo with competencies, experiences, cultural awareness and skills that make them globally competitive in the world arena.” To achieve this goal will require organizational change. The KRA team studied and selected international populations that can bring international benefits to Saint Leo. The effort will include the development of “BRIDGE” programs for international students as they transition into Saint Leo. One or two new international partnerships also will be developed that will help Saint Leo have a significant impact on a global scale. This KRA will continue in the coming year and in the fall of 2012 it is expected that the team will complete their planning and launch programs in the fall of 2012.

KRA’s by design are limited in number and represent our university-wide strategic priorities to move us toward our vision. The KRA’s also become our highest budget priorities. I outlined, once again for the Strategic Planning Committee, the budget building process Saint Leo University has used during my tenure as President:

- Set KRA’s
- Forecast enrollments
- Project tuition rates
- Estimate revenue
- Set aside a surplus amount (required by bond covenants, SACS standards, banks and balanced scorecard measures)
- Fund KRA’s
- Set aside money for salary increases, training and development, and non capital asset maintenance
- Project and provide for uncontrollable costs such as: liability and health insurance, utilities, contractual increases
• Set macro capital budget
• Fund business as usual operations budgets as resources allow

After considerable discussion and deliberation the committee set the KRA’s for the coming year (2012-2013). They are:

• Technology Infrastructure and Improved Learning
• New Markets and Majors Determined by Analytics
• Integration of Career Academic and Experiential Initiatives

Continuing KRA’s
• Preparing Our Students for Globalization
• QEP
• Student Success (Campus Retention)

Action planning for the new KRA’s took place earlier this month and the continuing KRA’s will complete their work in the coming months.

The committee recognizes that Saint Leo faces new challenges and changes in the higher education marketplace in the coming years. The model followed in not-for-profit higher education is not a business model. Colleges and universities are tuition driven but tuition does not cover the true full cost of a college education. Budgets at public and private colleges and universities have generally been slashed across the board with significant impact on the quality of education. In the private sector, tuition at many schools is unaffordable for a great percentage of the population and tuition rate increases exceed the rate of inflation, yet college expenses are rising faster than net tuition. With the “borrower based” system of funding an education, graduates are leaving college with high levels of debt that many cannot re-pay. We are seeing fewer and fewer unrestricted gifts coming to colleges and universities. We can expect disruptive innovations soon that will change the higher education landscape even further. Programs like the TED Degree and the Kahn Institute suggest the possibilities for radical disruption of traditional higher education.
What do such changes portend for Saint Leo University? Undoubtedly, there will be more difficult times ahead. I told the committee we must maintain our discipline and not deviate from the four cornerstones of our success (mission, values, vision and planning, and accountability for execution). We will engage in strategic risk taking and take advantage of the opportunities that come our way in years ahead, and we will maintain our competitive advantage in the higher education marketplace by staying disciplined.

This memo is intended to bring you up to date on the planning process because our progress depends on everyone’s efforts being directed toward a common vision. Your good work in support of Saint Leo University makes our great achievements possible, and will determine how we will meet the challenges ahead.

We invite your comments. Please send any feedback to David Persky in the Assistant to the President's Office at david.persky@saintleo.edu.

All the best for a successful spring semester,

Arthur F. Kirk, Jr.
President