

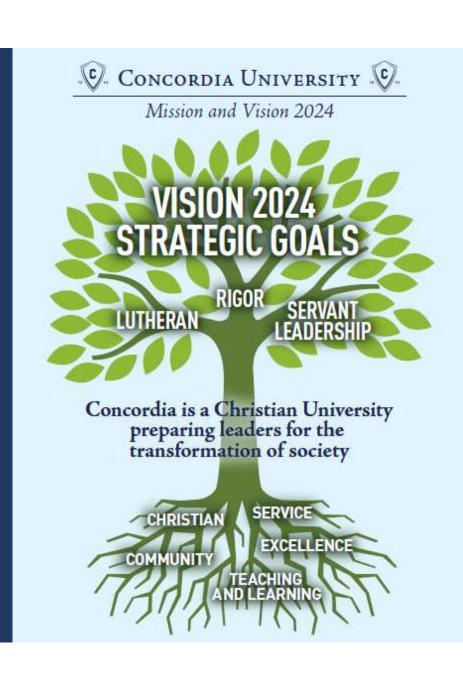
July 2019 Council of Trustees – Vision Report

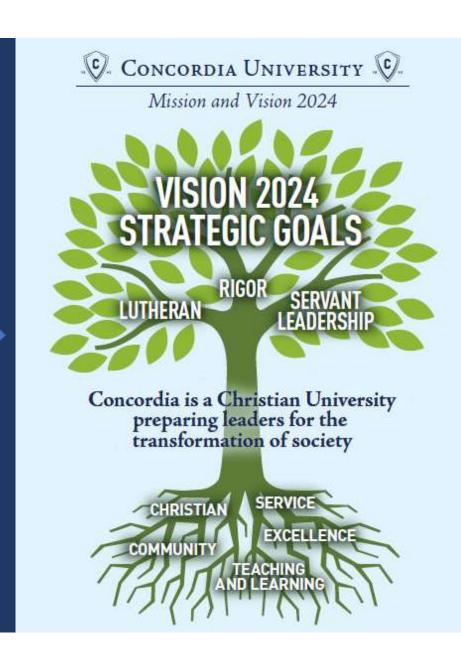


# Our time together today

 Review April 2019 Vision Attainment Report

• 2019-20 Strategic Priorities





October

April

### Threshold Metrics

Met	The threshold has been met.	No new data	There has been no new data since the prior Vision report. The threshold remains met.	biennial	This data is collected every-other- year. The threshold most recently was met.
Partially met	The threshold has been partially met.	No new data	There has been no new data since the prior Vision report. The threshold remains partially met.	biennial	This data is collected every-other- year. The threshold most recently was partially met.
Not met	The threshold has not been met.	No new data	There has been no new data since the prior Vision report. The threshold remains not met.	biennial	This data is collected every-other- year. The threshold most recently was not met.
T.B.D.	Threshold not yet determined.	No new data	Sufficient data not yet obtained.		

Strategic Goal	2016	2017	2018	2019
Theme Attainment	T.B.D.	Met	Met	Met
Intentional Enrollment	Partially met	Partially met.	Partially met	Met
Physical Presence	<b>O</b>	Not mat	Not set	Not met
Student Success	No. Text	Not mat	Not met	Not met
Transformative Alumni	Partially met	Partially met	Partially met	Partially met

Strategic Goal	2016	2017	2018	2019
Faculty and Staff Excellence	Not met	Met	Met	Met
Strategic Partnerships	Partially met	Partially met	Partially met	Met
Impactful Innovation	Not mat	Nct. met	Under Review	Not mad
Continuity and Communication	Not mal	Partially reet	Partially met	Not met
Stewardship and Value	Partially met	Not met	Not met	Not met

**Concordia University Portland Vision 2024 Attainment** 

Strategic Goal	2016	2017	2018	2019
Theme Attainment	T.B.D.	Met	Met	Met
Intentional Enrollment	Partially met	Partially met.	Partially met	Met
Physical Presence	<b>O</b>	Not mat	Not set	Not met
Student Success	No. Text	Not mat	Not met	Not met
Transformative Alumni	Partially met	Partially met	Partially met	Partially met

Strategic Goal	2016	2017	2018	2019
Faculty and Staff Excellence	Not met	Met	Met	Met
Strategic Partnerships	Partially met	Partially met	Partially met	Met
Impactful Innovation	Not mat	Nct. met	Under Review	Not mad
Continuity and Communication	Not mal	Partially reet	Partially met	Not met
Stewardship and Value	Partially met	Not met	Not met	Not met

**Concordia University Portland Vision 2024 Attainment** 

Strategic Goal	2016	2017	2018	2019
Theme Attainment	T.B.D.	Mot	Met	Mot
Intentional Enrollment	Partially met	Partially met	Partially met	Met
Physical Presence	T.B.D.	Not mel	Not met	Not met
Student Success	Not met	Not met	Not met	Not met.
Transformative Alumni	Partially met	Partially	Partially met	Partially met

Strategic Goal	2016	2017	2018	2019
Faculty and Staff Excellence	Not met	Met	Met	Met
Strategic Partnerships	Partially met	Partially met	Partially met	Met
Impactful Innovation	Not met	Not met	Under Review	Not met
Continuity and Communication	Not met	Partially	Partially met	Not met
Stewardship and Value	Partially met	Not met	Not met	Not met

**2019-20 Strategic Priorities** 



April 9, 2019 ELT – Vision Report & Assessment Update



## REFERENCE SLIDE SECTION



#### Theme Fulfillment

Concordia will ensure high levels of fulfillment of the Core Themes (Lutheran, Rigor, and Servant Leadership) in the midst of a changing environment.

Overall mission fulfillment is determined to have occurred as the institution meets or is making progress on a substantial number of Core Theme Objectives.

#### LUTHERAN

Concordia engages diverse perspectives in an environment of open discourse and academic freedom while bringing a distinctive voice and lens, rooted in the Christian faith, Lutheran understanding and heritage, and liberal arts tradition.



Grace-Filled Service Truth and Humility





Vocational Identity





Lutheran Identity

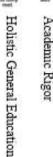
Lutheran Brand

#### RIGOR

Concordia's programs prepare students for meaningful vocations through intellectually challenging academic engagement, research and global preparedness.







Academic Rigor



Professional Preparation



Faculty Excellence Inclusive Diversity

Expectation and Experience

#### SERVANT LEADERS

Concordia creates an environment in which individuals are transformed, becoming servantleaders who are agents of positive change, through ethical, humble and rigorous leadership, with and for their communities and around the world.



Service Passion



Holistic Mentoring



Service Reputation



Exemplary Service



#### Intentional Enrollment

Concordia will serve an increasing number of qualified and diverse students who respect its values and mission.

#### Part Met

3 of 3 measured benchmarks met.



In Fall 2018, total undergraduate enrollment increased by +184 (+13.3%) from Fall 2017 - **Met**. The 2015-2017 rolling average increased by +299 (+23.5%) - **Met**. In Fall 2018, total graduate enrollment increased by 484 (12.2%) from Fall 2017 - **Met**. The 2015-2017 rolling average decreased by -19 (0.4%) - **Not met**.



In Fall 2018, 82.2% of on-ground undergraduate students participated in community service activities (-0.4% from Fall 2017 and +8.0% from Spring 2018).



In Fall 2018, 97.91% of incoming undergraduates met the standard admission requirements (+4.75% above the Fall 2015, Fall 2016, Fall 2017 three year rolling average).



Results pending. Improved data collection and metrics are currently under development in collaboration with the newly appointed Director of Diversity and Intercultural Engagement.



#### **Physical Presence**

Concordia will continue to enhance and expand its physical campuses and collegiate and community activities as sources of institutional strength.

#### Not Met

1 of 5 measured benchmarks met



In Winter 2019, 59% (-6% below target of 65%) of Portland community indicated that Concordia holds a high-quality campus and community experience. **Not Met.** 



In summer 2018, 84.28% (+19.28% above the target of 65%) of on-ground alumni agreed that Concordia hold a high-quality, positive physical campus experience. **Met.** 



In Spring 2018, 57.33% (-7.67% below target of 65%) of students agreed and in Fall 2018, 67.74% (+2.74% above target of 65%) of students agreed for an overall 2018 63.03% (-1.97% below target of 65%) agreement. Not Met.



FY 2018/19 \$400,000 was set aside to fund capital projects. Today all but \$100,000 has been spent on campus improvements. The balance is earmarked for an upcoming project, therefore we exceeded the amount spent on deferred maintenance in the previous year. We are on track to continue funding deferred maintenance in to the future with our newly developed five year capital planning procedure. **Not Met.** 



In Spring 2018, 44.02% of current students agreed and in Fall 2018, 55.90% of students agreed for an overall 2018 50.67% agreement (-29.33% below target). In Summer 2018, 79.04% of alumni agreed (-.96% below target). In Winter 2019, 61% of community members agreed (-14% below target). **Not Met.** 



#### Student Success

Concordia will provide strong support for student choice, access and success.

Not Met1

2 of 6 measured benchmarks met.



In 2018, students agreed that Concordia provided them with the support needed to ensure their academic success (83.11%; 6.89% below target); and to prepare you to get a good job or to advance in your present job (78.85%; 1.15% below target); and to interact effectively in diverse cultural environments (74.46%; .54% below target); and to better understand the Christian faith (47.53%; -27.47 below target).



In Spring 2018, 80.48% of current students felt faculty were caring and supporting and in Fall 2018, 84.38% of students agreed for an overall 2018 82.63% agreement. In Spring 2018, 79.60% of current students felt staff were caring and supportive and in Fall 2018, 83.82% of students agreed for an overall 2018 81.92% agreement.



In Summer 2018, 88.91% of alumni report faculty were caring and supportive (8.91% above target). In Summer 2018, 85.95% report staff were caring and supportive (15.95% above target).



In Spring 2017, Concordia held no engagement indicators which were significantly lower than other private West Coast institutions for first year students nor for senior students; and Concordia showed multiple year-over-year declines in performance.



By spring of 2019, 1 of 12 retention pools met the target rate per pool – Not Met. 3 of 12 retention pools retained students at a rate no less than 3% below the prior three period average – Not Met. Overall, 1 of 12 retention pools met the benchmark. **Not met.** 



By spring of 2019, 5 of 10 programs met the target rate per cohort – Partially met. 5 of 7 programs graduated students at a rate no less than 3% below the prior three period average – Met. Overall, 5 of 10 programs met the benchmark. **Partially met.** 



#### Transformative Alumni

Concordia will graduate well-prepared alumni who will enter meaningful vocations and serve as transformative leaders in the communities they serve.

#### Part Met

1 of 3 measured benchmarks met.



In 2018, 87.82% of alumni indicated satisfaction with the academic program that they completed at Concordia (+2.82% above target).



In 2018, 77.78% of alumni indicated that their education at Concordia assisted them in performing their current job (-2.22% above target) and in 2018, 85.38% indicated that their education at Concordia prepared them to succeed in graduate school (+5.38% above target).



In 2018, 72.2% of alumni participated in 1+ hours of community/volunteer service each week (-7.8% from the target of 80%).



#### Faculty & Staff Excellence

Concordia will provide for a qualified, diverse and caring faculty and staff.

#### Met1

3 of 3 measured benchmarks met.



In Summer 2018, 83.40% of alumni highly rated faculty within their academic area (+3.40% above target) and 80.39% of alumni highly rated faculty in their general education and elective courses (+0.39% above target), and 80.46% of alumni highly rated staff (+0.46% above target).



Faculty results: In the 2017-18 academic year 100% of the College of Arts and Sciences faculty (25 of 25); 92.31% of College of Health and Human Services faculty (12 of 13); 93.33% of College of Education faculty (42 of 45, including online dissertation faculty); 100% of CU Online faculty; 91.67% of the Law School faculty (11of 12); 100% of the Library faculty (5 of 5); and 100% of School of Management faculty (7 of 7) met expectations. In 2016-17 academic year 100% of School of Management faculty (7 of 7); 100% of School of Law faculty (12 of 12); and 100% College of Arts and Sciences faculty (27 of 27).

Staff results: In the 2017-18 academic year of the 69% of staff reviewed, 89% met expectations (99 of 111). In 2016-17 Human Resources is continuing the pilot of the new staff evaluation system.



To investigate if Concordia University is progressing on key faculty and staff diversity measures improved data collection and metrics are in development including comparative pools for major employee categories and a statistical referent for each in collaboration with Human Resources, Director of Diversity, Intercultural Engagement, and the new Diversity Advisory Committee.



In Spring 2018, 80.48% of current students agreed that faculty are caring and supportive (+5.48% above target) and in Fall 2018, 84.38% (+9.38% above target) of students agreed for an overall 2018 82.63% (+7.63% above target) satisfaction; and in Spring 2018, 79.60% of current students agreed that staff are caring and supportive (4.60% above target) and in Fall 2018, 83.82% (+8.82% above target) of students agreed for an overall 2018 81.92% (+6.92% above target) satisfaction.



### **Strategic Partnerships**

Concordia will develop, expand and diversify strategic partnerships which advance its mission and vision.

#### Met

2 of 2 measured benchmarks met.



As of January 2019, 6 of 6 strategic partnerships are compliant; all are at goals.



As of March 2019, 6 of 6 strategic partnerships have completed or are in process of risk assessments; 6 have contingency/mitigation plans in place.



#### Impactful Innovation

Concordia will be marked by and known for innovative people, programs, relationships and applications of technology.

#### Not Met

2 of 5 measured benchmarks met.



For 2018-19, these two initiatives are the redevelopment of the School of Management and the Expansion of the Nursing Program. A progress report on each will be provided at the end of the 2018-19 academic year.



In Summer 2018, 73.98% (-1.02% below target) of alumni agreed that Concordia's culture **encourages** experimentation and innovation. In Summer 2018, 62.85% (+12.15% below target) of alumni agreed that Concordia's culture **rewards** experimentation and innovation.



In Spring 2018, 74.67% of current students agreed and in Fall 2018, 77.02% of current students agreed for an overall 2018 75.95% (.95% above target) agreement.



In Spring 2018, 39.47% (-35.53% below target) of faculty and staff agreed that Concordia's culture encourages and rewards experimentation and innovation.



In Winter 2019, 48% of community members strongly or somewhat agreed that Concordia's culture encourages and rewards experimentation and innovation.



#### Continuity and Communication

Concordia will design and implement effective and efficient operational and institutional communications systems, and ensure the strength, development and continuity of leadership at all levels.

#### Part Met

1 of 3 measured benchmarks met.



As of January 2018, 8 of 8 Cabinet Members submitted succession plans to the Office of the President.



Results: A comparable survey was conducted in March of 2019. Results are pending.



In Spring 2017, 45.46% of full-time faculty were satisfied or very satisfied that they received adequate and timely communications from the university to support their role and responsibilities (-44.54% below target); 43.64% of full-time staff (-46.36% below target); 70.84% of part-time faculty (-4.16% below target); and 37.5% of part-time staff (-37.5% below target).



#### Stewardship & Value

Concordia will ensure good stewardship of its resources and long-term mission viability while safeguarding a strong value for return on student investment in their education.

#### Not Met

1 of 5 measured benchmarks met.



Unrestricted operating net assets have decreased -\$955,677 from the period starting July 2017 to the period ending June 2018 with no increase in unrestricted net worth.



As of 2017-2018, we met the required debt covenants requirements as follows:

- Coverage Ratio to be at least 1:1
- Debt To Equity Ratio not to exceed 2.25: 1
- Liquidity requirement to maintain at least \$2.5M in liquid assets



In Spring 2018, 70.48% of students agreed and in Fall 2018, 72.13% of students agreed for an overall 2018 71.35% agreement. (-8.65% from target).



In Summer 2018, 70.31% of alumni agreed that Concordia provided a good return on their tuition investment (-4.69% below target).



In Summer 2018, 44.17% (-35.83% from target) of employees agreed that Concordia provides them adequate resources and support to fulfill their assigned responsibilities.