



PLATFORM FOR PROGRESS

STRATEGIC PLAN REPORT

2022

Tier 1 Background, Goals, and Initiatives



ROSE-HULMAN
INSTITUTE OF TECHNOLOGY



There has been significant progress and momentum on campus since the development of Rose-Hulman's last strategic plan in 2013, due in large part to the efforts of the entire campus community and leadership from the Board of Trustees. This—combined with the successful completion of the Mission Driven comprehensive funding campaign—led us to the natural next step of this growth, which emerged in spring 2021 when Rose-Hulman announced a new two-tier strategic planning process.

The first tier is a shorter-term three-year plan, championed primarily by the President's Cabinet, and focused on creating a firm foundation for the launch of a more comprehensive and longer-term Tier 2 plan to coincide with the Institute's sesquicentennial in 2024. The Tier 2 plan will have a much broader scope, scale, and stakeholder participation.

A Case Statement for the Tier 1 plan was presented to the campus community for feedback in spring 2021, resulting in five near-term goals to be addressed by the Tier 1 plan:

1. Leverage International Enrollment
2. Align Student Enrollment and Capacity
3. Respond to Shifts in Methods Used to Identify and Engage Prospective Students
4. Enhance Student Retention
5. Enhance Operational Revenues in a Tuition Dependent Model

An additional goal was added in the fall of 2021 as a result of the Campus Climate Survey work:


6. Strengthen a Culture of Trust and Transparency

The primary purpose of this document is to outline the goals, key initiatives and progress to date related to these Tier 1 goals. Following are the proposed strategic responses to each of the items identified in the Tier 1 Case Statement, based on feedback from the goal committee members, our Board of Trustees, and the campus community.

A critical component of this process is the continued input and involvement of the entire campus community. I invite you to share any and all feedback you have to sharpen or refine the Tier 1 proposed strategic responses with the specific goal chairs.

I will continue to share progress updates on our efforts to address the Tier 1 near-term goals throughout the next three years. Additionally, look for more information soon on the Tier 2 plan, including an upcoming information session and specific details regarding how you can be involved in that process. More information about the Tier 2 planning process can also be found at the end of this document.

Thank you for your continued dedication to our mission at Rose-Hulman.



Robert A. Coons
President

GOAL 1: Leverage International Enrollment

The decline in enrollment of first-year international students is not unique to Rose-Hulman and matches a trend currently being experienced by many colleges and universities across the country. Over the next three years, several factors have the potential to impact international student enrollment, including:

- COVID limiting worldwide travel.
- Ongoing geopolitical tensions resulting in VISA restrictions and delays in processing by the U.S. government.
- Increasing competition by countries that are offering greater college affordability and “stay and work” options.
- Safety concerns by international students in the United States.

To respond to the challenges posed by declining international enrollment, Rose-Hulman is:

1. Changing its recruitment outreach to establish a more national enrollment base. This will decrease current dependence on international and Midwest student markets, which are both currently experiencing enrollment downturns. We are doing this by:
 - a. Incorporating demographic profiling into its student solicitation process.
2. Partnering with professional organizations that service international students and facilitate enrollment to U.S. colleges and universities. These contractual relationships require Rose-Hulman to make financial investments to gain access to international student markets.
3. Recruiting with partner colleges and universities including Lafayette College, Syracuse University, Rochester Institute of Technology, and Lawrence Technological University. Group travel by means of video or in-person is growing in the industry and allows for greater access to international students.
4. Providing need-based financial assistance to international students. This is a move away from the institution’s historical practice of only offering merit scholarships to international students. We are doing this by:
 - a. Utilizing the International Association of College Admission Counseling financial aid application.
 - b. Placing Rose-Hulman’s scholarship calculator on its international admission website.
5. Planning for international travel in 2022 based upon accessibility to countries due to COVID travel restrictions. We will be doing this by:
 - a. Initially targeting the countries of India and South Korea for travel.
6. Recruiting international students who are already residing and/or attending schools domestically.
7. Changing the I-20 certificate of eligibility form process to be more responsive to admitted international students and more competitive with peer institutions.

Goal Champion: Tom Bear
Members of Goal Planning Teams: Kathy Hammett, Matt Lance, Santhana Naidu

GOAL 2: Align Student Enrollment and Capacity

Over the past 10 years, the fall undergraduate enrollment at the Institute has averaged approximately 2100 students. In the fall of 2021, we started the year with an undergraduate enrollment of approximately 50 students fewer than our 10-year average despite having the largest Y1 class in the history of the Institute. One impact of this has been that the cost of operating the Institute is spread over fewer students. Over the past 10 years, the average ratio of the number of students to full-time teaching equivalent faculty has been approximately 13.8. At the start of fall of 2020, that value was less than 12.5 and rose to 12.7 in the fall of 2021. At the same time, localized stresses have emerged as students have shown greater interest in specific programs like the computer science program. Ten years ago, approximately 11% of the students at Rose-Hulman majored in computer science. Now approximately 24% are computer science majors which mirrors national trends with CS majors now outnumbering ME majors nationwide. To remain financially strong, the Institute needs to be able to respond to shifts in the interests of students while at the same time ensuring that there is alignment between our capacity and enrollments, both in a global sense and by program.

To align student enrollment and capacity, Rose-Hulman will:

1. Return to a ratio of the number of students to full-time teaching equivalent faculty of approximately 13.5-14.0 to 1, while adjusting to long-term enrollment shifts.
2. Increase its ability to flexibly respond to short-term shifts in enrollments. The actions being proposed to do that include:
 - a. Putting systems in place to enable more flexibility in the courses that faculty can teach. This could include course cross-training opportunities during the summer for courses that are under enrollment stress.
 - b. Improving the Institute's ability to quickly identify, attract, hire, and support non-tenure track instructors.
 - c. Taking advantage of the flexibility in our curriculums to relieve teaching load stresses.
3. Increase enrollments in under-enrolled programs by emphasizing recruitment efforts in those programs. The actions being proposed to do that include:
 - a. Conducting a deeper analysis of why prospective students who indicated interest in an under-enrolled program did not enroll.
 - b. Increasing targeted and focused communication for under-enrolled programs.
 - c. Increasing the use of high school outreach programs to highlight under-enrolled programs.

Goal Champion: Rick Stamper

Members of Goal Planning Teams:

- Flexibly Respond to Short-Term Shifts in Enrollment: Kay C Dee, Ella Ingram, Jenny Mueller, Russ Warley
- Increase Enrollments in Under-Enrolled Programs: Tom Bear, Kim Henthorn, Russ Warley, Ross Weatherman, Bill Weiner

GOAL 3: Respond to Shifts in Methods Used to Identify and Engage Prospective Students

As the enrollment of undergraduate students has become more competitive, the market has responded by expanding the scope of opportunities for high school students to engage with colleges. This has meant that the reach to engage students has dropped to lower grades. As a result, Rose-Hulman has built an array of pre-college programs that first engages high school students following the ninth grade. Each program is thematic and coordinated to build students' STEM desire and competence over time.

Digital experiences for prospective students are constantly evolving as new technologies are developed and the marketplace gets even more competitive, to draw a prospective student's attention. So, Rose-Hulman has revamped our marketing and communications efforts to ensure Rose-Hulman's value proposition is clearly and effectively communicated to prospective students and families.

To meet undergraduate enrollment goals, the institution is building multiple pools of prospective students who are considering STEM degrees and are academically prepared for challenging math and science curriculums we offer.

To accomplish these tasks, Rose-Hulman is:

1. Conducting strategically planned prospective student searches using nationally standardized academic assessments. These multiple class searches produce prospective students monthly which Rose-Hulman licenses and then engages in structured recruitment campaigns appropriate to the year in school. We are doing this by:
 - a. Contracting with College Board and ACT for student identification, and supplementing targeting with acquisition of demographic and/or consumer data.
2. Piloting searches with vendors who provide access to prospective students based upon demographic and/or behavior data or are introducing other new and innovative outreach mechanisms.
3. Encouraging and carefully tracking prospective student engagement with Rose-Hulman's website and encouraging greater levels of commitment by providing individualized content concerning demonstrated areas of potential student interests.
4. Expanding the promotion of print and electronic pre-college publications – specifically targeting students, parents, high school counselors, and Community Based Organizations.
5. This promotion highlights the following new/enhanced offerings:
 - a. **Rose-Power** for high school girls who just completed ninth grade. Rose-Power is a one-week residential camp that allows students to work in the college's maker spaces.
 - b. **Project Select** for students who just completed ninth and tenth grades. Project Select is a one-week residential immersive science and engineering camp.

- c. **Operation Catapult** for students who just completed tenth and eleventh grades. Operation Catapult is a twelve-day project based residential camp.
 - d. **Creation Crates** for students who just completed tenth and eleventh grades. Creation Crates is a design-at-home experimental engineering program.
 - e. **Rose Accelerate** for students who just completed eleventh and twelfth grades. Rose Accelerate allows students to take online core college classes and earn credits toward a Rose-Hulman degree.
6. Redesigning our external website to increase engagement, showcase our campus and people, and share stories about the Rose-Hulman experience and outcomes.
 7. Using social media to showcase the Rose-Hulman experience.
 - a. Institutional owned accounts – relying on Instagram and YouTube as our primary channels for engaging prospective students.
 - b. Life at Rose – we are coordinating a weekly student and/or faculty/staff takeover of our @lifeatrose Instagram account to tell the Rose-Hulman story in an authentic way through the voice of a student or faculty/staff every week.
 8. Managing a persistent email campaign with two tracks – brand message and process oriented – targeting prospective students in sophomore, junior and senior years of high school.
 9. Leveraging alumni connections to drive applications and campus visits.
 10. Using new print materials focused on four pillars (academic reputation, experiential learning, community, and outcomes) with increased cadence.
 11. Launching a new prospective parent engagement platform, as they are increasingly playing a major role in the college selection process.
 12. Building a high school guidance counselor email list and communication strategy.

Goal Champions: Tom Bear and Santhana Naidu

Members of Goal Planning Teams:

- Grow Pre-college Engagement Programs: John Aidoo, Nick Davis, Rene Hankins, LeAnne Myers, Renee Rogge, Russ Warley
- Grow Engagement and Outreach with Prospective First-year Students and Influencers: Erik Hayes, Lisa Norton, Stephanie Poland, Charlie Ricker, Paul Shepherd

GOAL 4: Enhance Student Retention

Rose-Hulman will place additional resources into enhanced methods of identifying at-risk students and increasing support mechanisms. In addition to academic support, the increasing mental health challenges faced by the generation of college students will be addressed by implementing new and collaborative programs and initiatives.

To develop a plan to enhance student retention, Rose-Hulman will:

1. Create a communication and support strategy led by Student Academic Success and the Learning Center that encourages, motivates, and facilitates students to make use of campus learning resources.
 - a. Engagement with these resources may be required of students (e.g., for students placed on academic probation or as criteria for readmission).
2. Create a repository of advising resources that will be available to the range of individuals who provide advice to students.
3. Improve pre-calculus preparation available to students and offer courseware support for Maple (Institute-selected math software).
4. Rose-Hulman will work with DePauw University and Saint Mary-of-the-Woods College to implement the Mental Health Initiative funded by the Lilly Endowment. Representatives from each institution will work collaboratively to establish the nonprofit corporation MINDful College Connections ("MCC"), a higher education consortium designed to improve the capacity of the participating institutions in meeting the growing need for mental health care services for college students in support of student wellness and success in college and throughout their lives.
 - a. Work with the MCC Steering Committee and Ice Miller (legal counsel) to establish the nonprofit corporation and related support structure.
 - b. Work with the MCC to hire an Executive Director by early 2022. The MCC Board of Directors will oversee the search.
 - c. Establish an advisory team to help guide/affirm Rose-Hulman's position on the direction of the MCC in addition to advising Rose-Hulman on specific decisions.

Goal Champions: Erik Hayes and Rick Stamper

Members of Goal Planning Teams:

- MINDful College Connections: Patty Eaton, Mike Latta, Rachel Petrik, Haiden Smith
- Academic Programs for Retention: Tom Bear, Bernadette Ewen, Sarah Forbes, Matt Lovell

GOAL 5: Enhance Operational Revenues in a Tuition Dependent Model

As a tuition-dependent institution with in excess of 60% of the school's revenue derived from net tuition, Rose-Hulman's financial model is very sensitive to changes in the market environment affecting student-related revenues. Specific factors having a large impact on overall institutional revenues include:

- The size of the student body.
- Occupancy on campus and related participation in meal plans.
- Pricing structures and adjustments for tuition, fees, room, and board.
- The rate and source (funded vs. unfunded) of financial aid provided to students.

Each of these factors is regularly analyzed, discussed, and projected in the normal course of the Institute's planning and budgeting processes.

Like many institutions, as the market environment has shifted in recent years, pressure on a number of these factors has led to an overall decline in the Institute's net tuition revenue. Addressing this decline in a comprehensive and coordinated way requires enhancements to, and further development of, the Institute's planning processes in order to ensure that the interactions between student body size and composition, workload planning, recruiting strategies, housing and meal policies, and financial outputs are clearly understood.

In order to address these considerations, Rose-Hulman will:

1. Further integrate current financial modeling processes with current enrollment management modeling processes. While these models have always been coordinated, they have traditionally used different definitions for inputs and outputs and have in some cases pursued different goals. These models will be more completely integrated by normalizing definitions and by specifying required model outputs so that the needs currently met by two separate models can be met by a single, fully integrated model. This will allow for more dynamic scenario planning that provides a picture of expected financial outcomes while also modeling the impact of various recruiting strategies on the sub-populations of an expected first-year class and the student body as a whole.
2. Expand the newly integrated enrollment model to produce a projected class distribution by discipline both for first-year and upper-class students. This will allow better integration with teaching load planning processes in order to include faculty availability and needs in scenario planning.
3. Perform more specific and detailed variable vs. fixed cost analyses to better evaluate alternative strategies for achieving a balanced financial model over time while understanding the implications for workload planning.
4. Use the enhanced planning and modeling tools more systematically to evaluate the appropriate direction for recruiting strategies, hiring plans, and other planning efforts on an ongoing basis.
5. Continue pricing studies by using external data sources to ensure competitiveness of desired net tuition revenue per undergraduate student.

Goal Champion: Matt Davis

Members of Goal Planning Teams: Tom Bear, Mike DeVasher, Stephanie Lanke, Melinda Middleton, Rick Stamper

GOAL 6: Strengthen a Culture of Trust and Transparency

A stronger organizational culture begins with sharing knowledge and providing greater transparency, which is foundational to trust. Utilizing feedback from the Climate Survey and the Strategic Learning Teams survey we can facilitate a greater understanding of Institute operations by providing internal stakeholders (faculty, staff, and students) with responses to the three central questions: Who, How, and When?

To answer these questions, Rose-Hulman will:

1. Create interactive, cross-referenced, and user-friendly flow charts for the following:
 - a. Institute and area-level operational/financial/budgetary decisions.
 - b. Communication plans and templates.
 - c. Streamlined institutional data access.
 - i. Establish public vs. confidential information and define access.
2. Develop an improved communication approach based on the following:
 - a. Stakeholder survey to identify/understand current campus communication styles.
 - b. Bidirectional communication framework.
 - i. Allow for feedback and collaboration.
 - ii. Outline expectations for community and leaders.
3. Create a web-based information site, "Have you Heard?"
 - a. Develop opportunity to inquire and actively share information to minimize misunderstandings or misinformation.
 - b. Searchable FAQs.
 - c. Links to appropriate resources.

Goal Champion: Megan Elliott

Members of Goal Planning Teams: Craig Downing, Jason Lafary, Stephanie Lanke, Michelle Marincel Payne

In Conclusion

The tiered approach to strategic planning is traditionally used when external influencers are extremely challenging. Given the overall state of global affairs in January 2022, most would agree that indeed, external influencers are extremely challenging.

The Tier 1 planning (outlined in this report) seeks to effectively realign revenues with expenses, a critical next step to move the Institute forward. Like all planning processes, this is a living and evolving document designed to ensure a solid foundation on which the Rose-Hulman community can begin to dream big and bold. Tier 1 will continue to evolve and be enhanced with inputs from stakeholders as we move through the next couple of years.

Tier 2 of this process, done well, is intended to provide our community the space to dream big and bold. It should permit us to realign and pivot to a new longer-term strategic direction for the future of Rose. It should create a platform to innovate strategically moving forward. And it should create excitement about the future of Rose-Hulman Institute of Technology.

The Steering Committee for our Tier 2 approach has begun its work, meeting and outlining a process that all believe will serve the Institute and of our stakeholders well. This group includes President Coons, Erik Hayes and Rick Stamper. This process will involve surveying large representative groups of all relevant stakeholders, conducting focus groups for more refined input and data gathering, and then broad analysis and synthesis of that data gathered into areas of focus from which a detailed strategic vision for the future can evolve.

On the heels of a successful Mission Driven Campaign, with strong enrollments, a new academic facility, and success on many levels, this is an excellent time to articulate an even brighter future, of which the entire Rose-Hulman Community will be an integral part.

Go Rose!