



ROOSEVELT
UNIVERSITY

**Legacy Redefined:
Advancing Access and Success**

Institutional Strategic Plan 2013
— Executive Summary —

CORE VALUES

Drawing from the events of its founding, Roosevelt University is guided by the following core values that are grounded in social consciousness and action that create a just society, offer opportunity, and develop individuals:

Diversity and Inclusivity: leading to embracing and celebrating differences and the ability to be courageous in our decisions.

Enlightenment and Awareness: leading to enhanced understanding and significant and impactful lives.

Integrity and Civility: leading to an ability to identify universal and personal truths, to respectful discourse and an understanding of one's responsibility to act for the good of the whole.

Adaptability and Transformation: leading to intellectual growth and a willingness to engage in challenges that broaden thinking and address practical problems.

Knowledge and Wisdom: leading to actions that create the greater good for our society.

MISSION

Reflecting the ideals of its founders in 1945, Roosevelt University is a private, nonsectarian community of educators, scholars, and learners committed to academic, creative, and service excellence who value differences in personal experiences and perspectives; ask the difficult questions; and promote mutual understanding, inclusion, social consciousness, and action toward social justice. Recognizing that difference broadens perspectives, Roosevelt University seeks and serves a diverse, promising student body from metropolitan Chicago and around the world.

The hallmarks of the Roosevelt University experience are strong student-faculty interaction and engagement with metropolitan Chicago as both a laboratory for learning and as an expression of its commitment to social justice. The experience is created through the efforts of a strong faculty dedicated to excellence in teaching, research, and creative activity and a staff equally focused on helping students grow and achieve their educational and life goals.

Roosevelt is a metropolitan university that is an active partner in the social, economic and cultural development of the communities it serves. It offers a broad array of academic programs, from the baccalaureate through doctoral levels, in a highly interactive environment where students can explore, discover, and develop their unique abilities and interests.

VISION

Roosevelt University is nationally recognized for providing transformational experiences and opportunities for discovery that create socially conscious citizens who are leaders in their professions and their communities.

GOAL STATEMENTS

1 Bring greater clarity to the role and mission of Roosevelt University as a whole, for the Chicago and Schaumburg campuses, and for the Adult/Experiential Learning Program; and strengthen social justice and civic engagement.

2 Enhance the total student experience to increase retention, graduation rates, and enrollment; and cultivate students being at home in a diverse community.

3 Enhance the quality of life for faculty and staff.

4 Increase/diversify non-tuition revenues.

5 Improve institutional effectiveness.

Institutional Strategic Plan—Goal 1:

Bring greater clarity to the role and mission of Roosevelt University as a whole, for the Chicago and Schaumburg campuses, and for the Adult/Experiential Program; and strengthen social justice and civic engagement.

DESIRED OUTCOMES

- Roosevelt University will become more nimble, effective, and responsive to the different regional, national, and global educational market needs and opportunities.
- Each college or academic major will review its curricula and instructional delivery approaches to ensure that all students have ample opportunities to learn about and experience social justice and civic engagement as well as other core values of the University.

STRATEGIES

1. Create distinctive marketplaces—Chicago, Schaumburg, Adult/Experiential—to become more responsive to the needs of the community and deliver instruction.
 - a. Conduct an evidence-based, consultative, and inclusive process that will investigate how to respond to distinctive marketplaces and develop appropriate budgetary allocations, governance structures, and leadership structures to best meet the needs of students.
2. Develop a Social Justice Inventory (SJI) of the current social justice-oriented activities and curricula in place, and act on findings.
 - a. Promote opportunities for Roosevelt University and community members to participate;
 - b. Identify opportunities to streamline and facilitate social justice initiatives; and
 - c. Fill gaps in social justice-oriented programming and support expansion and innovation.
3. Develop a mechanism for faculty and students to conduct research on significant community problems.
 - a. Create a research institute to study and develop applied policy solutions to problems facing communities and to create training for community organizations to help them do their work.
 - b. Connect and synergize existing institutes.
4. Develop an annual ranking of the most socially conscious organizations in recognition of Roosevelt's unique mission.

Institutional Strategic Plan—Goal 2:

Enhance the total student experience to increase retention, graduation rates, and enrollment; and cultivate students being at home in a diverse community.

DESIRED OUTCOMES

- Actively recruit students with a commitment to social justice that upholds the mission, vision, and values of Roosevelt University;
- Proudly maintain a historical commitment of enrolling students of promise;
- Continue to be a comprehensive university with strong undergraduate and graduate degree programs;
- Renew a commitment to adult degree completion and transfer students throughout our communities;
- Maintain commitment to full-time freshmen and professional graduate degree students; and
- Enroll a student body that meets or exceeds the enrollment projections set forth in the University's bond covenants.

1. Programs and services will be in place to improve student persistence and degree completion.

	By Fall 2018:	Current	Desired	Difference
a.	The second-year retention rate among freshmen at all campuses will be at or above mean of comparable peer groups.	58%	70%	12%
b.	The second-year retention rate among transfer students will be at or above mean of comparable peer groups.	70% CHI 80% SCH	82% 82%	12% 2%
c.	Programs and services will be in place to improve the six-year graduation rate for full-time freshmen entering in fall 2018 will be at or above the mean of comparable peer groups.	45%	51% (2012 cohort)	6%
d.	The graduation rate among masters students will increase by a minimum of 7 percent.	71%	78%	7%

2. Results from surveys of student satisfaction and educational gains will exceed the average of peer institutions in areas of critical importance to student recruitment, retention, and academic success as measured by the Student Satisfaction Inventory (SSI) and National Survey of Student Engagement (NSSE).

STRATEGIES

1. Improve academic advising.
2. Develop an effective early alert program.
3. Create stronger and coordinated internship and career-development programs for each entity.
4. Establish learning and theme communities.
5. Provide consistent, accessible, respectful, and efficient services to students, (the C.A.R.E. Program).
6. Establish a summer bridge program to help students make a successful transition into college.

Institutional Strategic Plan—Goal 3:

Enhance the quality of life for faculty and staff.

DESIRED OUTCOMES

Roosevelt University will be recognized as one of the Chronicle's "Great Colleges to Work For."

	By Fall 2018:	Current	Desired	Difference
1.	Incorporate a "career span" professional development and assessment process for all faculty and staff. <ol style="list-style-type: none"> Enhance employee orientation. Implement C.A.R.E. Service Excellence Program. Develop comprehensive annual employee reviews. Develop comprehensive leadership development program. Develop a professional development program for faculty. <ol style="list-style-type: none"> <i>Great Colleges to Work For</i> Survey: % of satisfaction HERI faculty Survey Develop a Professional Development Program for Staff . <ol style="list-style-type: none"> <i>Great Colleges to Work For</i> Survey: % of satisfaction 	<ol style="list-style-type: none"> NA NA Varies by dept NA NA <ol style="list-style-type: none"> 2008: 30.6% Data not available Attendance records not available 2008:57.8% 	<ol style="list-style-type: none"> 95% 98% 100% 95% 75% <ol style="list-style-type: none"> 80% TBD 75% <ol style="list-style-type: none"> 75% 	<ol style="list-style-type: none"> TBD TBD TBD TBD TBD <ol style="list-style-type: none"> 49.4% TBD TBD <ol style="list-style-type: none"> 25.2%
2.	<ol style="list-style-type: none"> Set competitive retirement benefits for faculty and staff. Set competitive salaries for faculty and staff. 	<ol style="list-style-type: none"> Tiered contribution: 4% on first \$40,000 of salary to maximum of \$2,800 per year Currently do not have a salary structure 	<ol style="list-style-type: none"> On a par with selected peers On a par with selected peers 	<ol style="list-style-type: none"> TBD TBD
3.	The diversity of faculty, staff and administration mirrors the student body. <ol style="list-style-type: none"> Faculty: Women Faculty: Non-Caucasian Management: Non-Caucasian 	<ol style="list-style-type: none"> 43% 27% 39% 	<ol style="list-style-type: none"> 67% 50% 50% 	<ol style="list-style-type: none"> TBD TBD
4.	Improve the results of Roosevelt faculty on UCLA's HERI faculty survey.	NA	TBD	TBD
5.	Improve the result of the Great Colleges to Work For survey.	2008 – last year of participation	TBD	TBD

STRATEGIES

- Enhance professional development programs for faculty, staff, and management.
- Create competitive compensation and benefits programs.
- Strengthen recognition programs, communication and the sense of community.
- Assess organizational climate and quality of life, and act on findings.

Institutional Strategic Plan—Goal 4: Increase/diversify non-tuition revenues.

DESIRED OUTCOMES

- Increase non-tuition, operating revenues from \$8.2 million to \$15.7 million (7 percent to 10.3 percent)—**an increase of \$7.5 million.**
- Increase non-operating capital budget revenues from \$1.2 million to \$3 million—**an increase of \$1.8 million.**

	By Fall 2018:	Current	Desired	Difference
1.	Rental fees (activities, events, summer residence hall, etc.) generate annual revenues of \$2 million.	\$100,000	\$2,000,000	\$1,900,000
2.	Roosevelt University generates total annual revenues of \$6.3 million through contracts; sponsored programs; and training and research grants.	\$4,200,000 (\$0 in research)	\$6,300,000	\$2,100,000
3.	Coordination of continuing and professional education offerings in the colleges collectively generate annual revenues of \$500,000.	Not Currently Quantified	\$500,000	\$500,000
4.	Total annual <i>unrestricted</i> donations are \$2 million.	\$1,232,000	\$2,000,000	\$768,000
5.	Total annual <i>restricted</i> donations are \$4 million.	\$2,340,000	\$4,000,000	\$1,660,000
6.	Mission-related businesses that leverage Roosevelt University's strengths (e.g., pharmacy clinic, development opportunities at Schaumburg) generate annual excess revenues of \$500,000.	\$0	\$500,000	\$500,000
7.	Annual leasing revenues (bookstore, coffee shop, cafeterias, antennae, vending machines, etc.) are \$450,000.	\$387,000	\$450,000	\$63,000
	Total non-tuition operating budget revenues	\$8,259,000	\$15,750,000	\$7,491,000
	Non-operating capital grants from government sources total \$3 million per year	\$1,186,000	\$3,000,000	\$1,814,000

NOTE: Non-operating capital grants are shown separately as they are not part of the annual operating income. Capital grants are used for building repair, maintenance, replacements, or new infrastructure construction, and are considered non-operating capital transactions.

STRATEGIES

1. Increase rental of University space.
2. Expand the number of contracts, training, sponsored programs, and research grants.
3. Offer more continuing and professional education programs.
4. Increase unrestricted annual contributions.
5. Increase restricted annual contributions.
6. Develop mission-related entrepreneurial ventures that generate revenues.
7. Expand the revenues generated from leasing University space.

Institutional Strategic Plan—Goal 5: Improve institutional effectiveness.

DESIRED OUTCOMES

	By Fall 2018:	Current	Desired	Difference
1.	100% of the strategic plan is implemented by 2018.	0%	100%	100%
2.	100% of academic programs are annually using enrollment, retention, demographic, student learning, and student satisfaction assessment data to improve programs and inform the wider community about their outcomes and continuous improvement plans.	TBD	—	—
3.	100% of student and academic support services are annually using student satisfaction and other assessment data to improve performance and inform the wider community about their outcomes and continuous improvement plans.	Benchmark data needed	—	—
4.	Analyses of existing operational systems (staffing and technological) have been completed, with specific recommendations for improvement identified, and steady progress has been made toward implementing the recommendations.	Benchmark data needed	—	—

STRATEGIES

1. Create an Office of Change Management (OCM) that reports to the President.
 - a. Coordinate priorities, implementation, monitoring, and evaluation of the strategic plan.
 - b. Serve as a neutral consultative function within the University, charged with managing and facilitating major strategic initiatives across the University.
2. Create a coherent, reliable, and well-communicated system for ongoing assessment that fosters a culture of continuous improvement.
 - a. Refine and enhance the existing Student Learning and Assessment Committee.
 - b. Create a parallel committee focused on the evaluation of University services.
3. Create a consistent, effective, and efficient institutional service delivery process (e.g., C.A.R.E. initiative).