



2015 – 2018

Strategic Plan

Martin University
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Greetings!

I am very pleased to share Martin University's 2015-2018 Strategic Plan with you. The Plan is the product of an inclusive public process which enabled faculty, administrators, staff, students, alumni, community patrons, and Board of Trustee members to share their ideas, wishes, and hopes for the improvement of the University. It provides a three-year road map for us to take the institution to a higher level of financial stability, program effectiveness, operational efficiency, and to enhance an environment and culture for greater educational achievement and personal growth.



This Plan is a continuation of the legacy and hopes of our founders, Fr. Boniface Hardin, OSB and Sr. Jane Schilling, CSJ. Please feel free to share it with others and if you have any questions and/or concerns contact me at ewhite@martin.edu.

Thank you for your time, support, and consideration of our University.

Sincerely,

Dr. Eugene G. White, President
Martin University



Strategic Plan 2015 - 2018

Mission Statement

Martin University's Mission is to provide excellence in educating and developing traditional and non-traditional students in an inclusive, supportive and healthy collegiate environment.

Vision

Martin University's Vision is to be a Haven of Hope, a Community of Support, and a Premier Leader among Institutions of Higher Education.

Martin University Values

In order to establish and maintain a University Culture that will produce educated, responsible, and accountable student graduates, the University will incorporate the following values in all actions, programs and endeavors:

- Professionalism (In all personal interactions, products produced, and University activities)
- Communication (Clear, appropriate, thoughtful and intelligent)
- Support and Respect for All (People, Relationships, Citizenship, Families and Social Justice).

STRATEGIC PLAN GOALS

The following five Strategic Goals are created to move Martin University to a higher level of operational efficiency, to ensure academic improvement, to establish solid financial accountability, and to raise the image and brand of the University.

Each goal is assigned to a University leader who will monitor, facilitate and ensure its success. The assignments are:

Goal One: Build Solid Financial Stability for the University
Michael Moos

Goal Two: Enhance Academic Programs and Services to Students
Dr. Charlesetta Smith Staley

Goal Three: Enhance, Expand and Improve Martin University's Campus and Infrastructure-Dr. Brian Steuerwald

Goal Four: Improve the Quality of Operations, and Working Conditions for Faculty, Staff, and Administrative Personnel-Dr. Eugene G. White

Goal Five: Enhance the University's Engagement and Services to the Community-Ms. Jennifer McCloud

The calendar of the Strategic Plan's review and assessment will begin May 2016 and continue May 2017 and May 2018. The Plan will direct our primary actions and initiatives for the next three years. If we achieve 75% of the Strategic Plan the University will be tremendously improved. However, if we achieve 100% of the Strategic Plan the University will be totally transformed and changed forever. This would truly be the beginning of a "New" Martin University.

This is a great time to be "All in for Martin!"

Strategic Three Year Goals

GOAL ONE

Build Solid Financial Stability for the University

Objectives

- I. **Increase Martin University's Total Yearly Student FTE' (Full Time Equivalents refers to the number of full time students based on the total credit hours for the academic year. FTE' are calculated by dividing the total credits for the academic year by 30) 5% Per Year from a Base of 306 FTE Students in Fiscal Year 2016 to a Total of 322 FTE Students in Fiscal Year 2017 and a Total of 339 FTE Students in Fiscal Year 2018**

Enabling Activities to Achieve Objective 1

- A. Implement the updated student enrollment plan
- B. Build a working relationship between the University and all Marion County High Schools, businesses, community organizations and associations
- C. Work effectively to improve the zip-code recruiting program
- D. Revise Prior Learning Assessment Program (PLA) to identify early those students who may be eligible for PLA Credits

Evaluation of the Success of Objective 1

- A. The student enrollment plan will be fully implemented for the Spring 2016 semester
- B. A formal survey of Marion County high school's head guidance counselors will indicate that 75% or more of them will be knowledgeable about Martin University and its academic programs. This survey will be conducted in April 2016
- C. Martin University will increase registration and enrollment of students beyond the 46218 zip code area by 20% in the fall of 2016; 25% in the spring of 2017; and 30% in the fall of 2017

Financial Status for Objective 1

- A. The cost of the enrollment plan will include the personnel and general expense of the recruiters. This will be an expense of \$167,937 for FY 2016, \$176,533 for FY 2017 and an expense of \$185,350 for FY 2018.
- B. The enrollment will be flat for fiscal year 2016 and a 5% enrollment increase in fiscal year 2017 will increase tuition revenue by \$243,811 and an increase in fiscal year 2018 of \$259,081
- C. The expense of conducting the survey of the guidance counselors will cost \$200 per year
- D. The increased income from the zip code expansion is included in the overall enrollment increase projected in "A" above

Total three year cost for Objective 1 - \$529,920 from general operating funds

II. Increase Retention of Current Martin University Students and Raise the Graduation Rate

Enabling Activities to Achieve Objective 2

- A. Have an intervention meeting with all students when they earn 60 credits toward graduation to review questions, concerns or make recommendations
- B. Provide a comprehensive review of the Student Academic Progress (SAP) during the Student Success in Higher Education (SSE) 100 course for beginning students
- C. Communicate and clearly post the course rotation schedule for all degree programs and provide students a listing of courses only offered during summer session
- D. Host a mentors' review session at the beginning of each semester to review information, changes and answer questions frequently asked by their mentees
- E. Require all new freshman students and new transfer students to complete needs assessments, Personalized Student Success Plans and assigns each a mentor
- F. Achieve ninety-five percent of all new and transfer students' participation in orientation

Evaluation of the Success of Objective 2

- A. Intervention meetings are scheduled, posted and conducted at the beginning of each semester. Files are developed and kept by the student, the registrar and mentor. These files will be randomly reviewed by Academic Affairs once each semester
- B. Student Academic Progress (SAP) material from the SSE 100 course will be available on the University website
- C. Course schedules and rotations will be shared with all students, mentors, and available on the University website
- D. Mentors review meeting dates will be on the University's official calendar
- E. The participation of all new students and transfer students in orientation will be documented

Financial Status for Objective 2

- A. Student and Retention Services are allocated salary and expense budgets for the fiscal years of 2016 to fiscal year 2018. The budget expense will be \$319,963 in fiscal year 2016; \$330,167 in fiscal year 2017; and \$339,850 in fiscal year 2018
- B. SAP process expenses are included in the overall budget totals in "A" above
- C. Marketing of course schedules is an expense included in the Office of University Relations and Communications
- D. Salary expenses for mentors are included in the budget for faculty

Total three year cost for Objective 2 - \$989,980 from general operating funds

III. Seek Funding to Create an Office of University Development and Advancement To Obtain Greater Resources and Funding for the University

Enabling Activities to Achieve Objective 3

- A. Create an Office of University Development and Advancement
- B. Create and submit a grant request to potential funders to finance a three year grant to employ a director, a full-time clerical assistant, and a part-time grant writer to establish the Office of University Development and Advancement
- C. Work with the Lilly School of Philanthropy at IUPUI to recruit candidates for the director's position
- D. Establish a year-round schedule of fundraising activities and campaigns
- E. Conduct a capital campaign to raise \$20 million for a student fine arts and activity center for the 40th anniversary year of the University in 2017
- F. Increase annual giving by 10% in fiscal year 2017 and 10% in fiscal year 2018

Evaluation of the Success of Objective 3

- A. Obtained a grant to fund the Office of University Development and Advancement
- B. Select a Director of University Development and Advancement by Fall 2015
- C. Develop a year-round calendar of fundraising activities and campaigns by Spring 2016
- D. Conduct a capital campaign 2017 to raise funds for a new students fine arts and activity center
- E. Increase annual giving to the University by 10% in FY 2017 and 10% in FY 2018

Financial Status for Objective 3

- A. The Office of University Development & Advancement will cost \$205,500 in fiscal year 2016; \$218,630 in fiscal year 2017; and \$235,549 in fiscal year 2018 in salaries and general expenses
- B. The Director's salary expense is included in "A" above at an annual salary of \$65,000 per year with a 2% increase per year in fiscal year 2017 and 2018

- C. Year round activities are budgeted for \$30,000 in fiscal year 2016; \$40,000 in fiscal year 2017; and \$50,000 in fiscal year 2018 included in the total department budget in “A” above
- D. Cost to conduct the capital campaign is included in the department budget in “A” above
- E. Unrestricted gifts will increase \$37,000 in fiscal year 2017 and \$40,700 in fiscal year 2018

Total three year cost for Objective 3 - \$893,021 from Sponsored Programs and \$61,212 from general operating funds

IV. Raise the University’s Composite Financial Index (CFI) Score to 2.0 by 2018

Enabling Activities to Achieve Objective 4

- A. The University will include a review of the impact of the yearly budgeting process on the CFI score
- B. The University will invest \$500,000 in fiscal year 2017 and \$1,400,000 in long term campus upgrades with long term bank financing
- C. The budgeting process will ensure adequate funds are available with each yearly budget to increase the unrestricted net assets to \$157,951 in fiscal year 2016; \$154,849 in fiscal year 2017 (FY 2017 includes an increase in interest expense attributed to long term debt); and \$164,909 in fiscal year 2018 (FY 2018 interest expense is flat)

Evaluation of the Success of Objective 4

- A. The yearly reported CFI (reported to the USDE) increases by 0.2 each year
- B. The University has submitted a CFI of 1.5 or greater for a financially stable higher educational institution to the United States Department of Education for fiscal years 2016 to 2018
- C. The University has submitted a CFI of 1.5 or greater to the Higher Learning Commission (HLC) for fiscal years 2016 to 2018
- D. The primary reserve section of the CFI has increased from a negative 0.33 to a zero or positive number by 2018
- E. The University has received a long term bank notes of \$575,000 in fiscal year 2017 and \$1,425,000 in fiscal year 2018
- F. The net assets have increased by \$157,951 in fiscal year 2016; \$154,849 in fiscal year 2017 (FY 2017 includes an increase in interest expense attributed to long term debt); and \$164,909 in fiscal year 2018 (FY 2018 interest expense is flat)

Financial Status for Objective 4

- A. The cost of the long term bank notes will be \$76,000 in interest in fiscal year 2017 and \$68,000 in interest in fiscal year 2018
- B. The depreciation reserve will be reduced by \$200,000 in fiscal years 2017 and 2018 for payment of the principal of the long-term bank notes

Total Three year cost for Objective 4 - \$144,000 from general operating budget and \$400,000 from the depreciation reserves

V. Strengthen Sponsored Programs

Enabling Activities to Achieve Objective 5

- A. Finalize revised Sponsored Programs Processes and Guidelines document
- B. Disseminate Revised Sponsored Programs Processes and Guidelines document to University personnel
- C. Hire a part-time grant writer
- D. Provide in-house grant writing workshops to University personnel
- E. Provide in-house grant management workshops to University personnel directing sponsored programs
- F. Develop and submit large grant proposals (i.e., funding requests \$200,000 or more)
- G. Develop and submit small grant proposals (i.e., funding requests less than \$200,000)

Evaluation of the Success of Objective 5

- A. Revised Sponsored Programs Processes and Guidelines document will be finalized in FY 2016
- B. Revised sponsored programs processes and guidelines document will be disseminated to University personnel in FY 2016
- C. A part-time grant writer will be hired in FY 2016
- D. A minimum of two in-house grant writing workshops will be provided annually to University personnel in FY 2016, FY 2017, and FY 2018
- E. A minimum of two in-house grant management workshops will be provided annually for University personnel directing sponsored programs in FY 2016, FY 2017, and FY 2018
- F. The University will develop and submit a minimum of three large grant proposals (i.e., funding requests \$200,000 or more) in FY 2016, FY 2017, and FY 2018
- G. The University will develop and submit a minimum of six small grant proposals (i.e., funding requests less than \$200,000) in FY 2016, FY 2017, and FY 2018
- H. The University will meet all the sponsored program funding needs outlined in the strategic plan in FY 2016, FY, 2017, and FY 2018

Financial Status for Objective 5

- A. There is no significant cost to the University to finalize the Revised Sponsored Programs Processes and Guidelines document
- B. There is no significant cost to the University to disseminate the Revised Sponsored Programs Processes and Guidelines document to University personnel
- C. The cost to hire a part-time grant writer is included in the cost of the Office of University Development & Advancement in Goal One, Objective 3 Financial Status

- D. There is no significant cost to the University to provide in-house grant writing workshops to University personnel
- E. There is no significant cost to the University to provide in-house grant management workshops to University personnel directing sponsored programs
- F. The cost to the University for writing large grant proposals is contained in point “C” above
- G. The cost to the University for writing small grant proposals is contained in point “C” above

Total Three year cost for Objective 5 – is included in the cost of the Office of University Development & Advancement in Goal One, Objective 3 Financial Status

VI. Develop a Ten-Year Financial Sustainability Plan for the University

Enabling Activities to Achieve Objective 6

- A. Increase the financial involvement and contributions of the Martin University Board of Trustees
- B. Request that the Board create a Board University Development and Advancement Committee
- C. Increase community awareness, involvement and financial support of the University
- D. Increase individual donor base with a multi-level recognition program
- E. Increase and improve the number of federal and national grant proposals
- F. Improve operational efficiency and cost-cutting efforts in the University
- G. Identify and continue successful fundraising efforts
- H. Develop a 10 year enrollment plan – 2019 to 2029
- I. Develop a feasibility study for Residence halls
- J. Develop a feasibility study for enrollment growth vs. campus space
- K. Develop a feasibility study for long term energy efficiency including renewable energy sources
- L. Develop a financial analysis for outside contract services vs. internal services for campus
- M. Develop long term investment strategies to include cash reserve, endowments, board restricted funds and financial investments and create a Board investment committee
- N. Develop a 10 year faculty and staff growth plan
- O. Continue to monitor variable bond for interest spikes

Evaluation of the Success of Objective 6

- A. Martin University’s Board contributions have increased to 100% participation and increase by 10% per year
- B. Martin University has an active and participating Development and Advancement Committee in fiscal year 2016
- C. Martin University meets quarterly with Martindale-Brightwood on University/community partnership activities

- D. Martin University recognizes donors during the Founder's Day Luncheon
- E. Martin University has received 5 new multi-year federal grants
- F. Martin University has followed the Board approved yearly operational budget
- G. Martin University has increased its fundraising income by 10% per year
- H. Martin University Board in fiscal year 2018 has approved the 2019-2029 enrollment plan
- I. In fiscal year 2019 Martin University has received and the Board has reviewed the Residence Hall feasibility study
- J. In fiscal year 2019 Martin University has received and the Board has reviewed the Campus growth feasibility study
- K. In fiscal year 2020 Martin University has received and the Board has reviewed the long term energy efficiency, including renewable energy study
- L. In fiscal year 2020 Martin University has completed and the Board has reviewed the outside contractor vs. internal services study
- M. In fiscal year 2019 Martin University has created a Board investment committee
- N. The University has submitted for review a 10 year faculty and staff growth plan

Financial Status for Objective 6

- A. There are no additional financial costs
- B. There are no direct financial impact
- C. Martin University has received additional donations from the Martindale-Brightwood Community
- D. Donor recognition will cost \$2,000 per year from operating funds for plaques and pendants
- E. Contract services for grants will cost \$12,000 per year or \$120,000 for the length of the 2019-2029 strategic outlook
- F. There are no additional financial costs
- G. There are no additional financial costs
- H. There are no additional financial costs
- I. Residence hall feasibility study will cost \$20,000 from general operating funds
- J. Campus growth study will cost \$10,000
- K. Energy efficiency study will cost \$10,000
- L. There are no additional costs for the Internal analysis
- M. Martin University will partner with investment firm at no additional cost
- N. There are no additional cost for the Internal analysis

Total Three year cost for Objective 6=\$180,000 for the 2019 to 2029 Strategic Plan – none for Strategic Plan 2016-2018. All costs from Objective 6 will be incurred during the 2019-2029 Strategic Plan cycle.

Grand Total Three year cost for Goal One = \$1,663,900 from general operating funds; \$400,000 from depreciation reserves; and \$893,021 from sponsored programs

GOAL TWO

Enhance Academic Programs and Services to Students

Objectives

I. Develop a Doctoral Degree Program in Urban Leadership

Enabling Activities to Achieve Objective 1

- A. Obtain Board of Trustees approval
- B. Prepare Institutional Change Request and submit to HLC
- C. Establish schedule of classes and organize sequence of courses
- D. Estimate faculty and space program requirements
- E. Develop curriculum with degree plan and learning outcomes
- F. Seek planning grant for program
- G. Develop and implement program marketing plan
- H. Enroll students in program

Evaluation of the Success of Objective 1

- A. Board of Trustees approval is obtained
- B. HLC approves Institutional Change Request by the end of FY 2017
- C. Degree plan with curriculum mapped out is established with required learning outcomes identified by end of FY 2017
- D. Grant received to develop program
- E. Faculty and space requirements are identified and obtained by FY 2017
- F. Marketing plan is implemented and recruiters begin soliciting students by end of FY 2017
- G. At least 15 students are enrolled in the first class in fall of FY 2018

Financial Status for Objective 1

- A. Cost for Institutional Change Request may include focused visit from HLC at \$5,000 from operating funds and human resource cost from the Doctoral Curriculum Committee at \$3,500 from general funds in FY 2018
- B. Additional cost associated with developing degree plan from the curriculum committee will be \$3,000 from general funds in FY 2018
- C. Additional full time and adjunct instructors needed at cost of \$89,875 in FY 2018 from sponsored programs
- D. Marketing materials and advertising costs required for new program will cost \$100,000 from sponsored programs
- E. Additional costs associated with enrolling students will cost \$11,250 for 15 students per year at \$750 per student from the operating budget

Total Cost for Objective 1 - \$212,265 (\$22,750 from general funds and \$189,875 from sponsored programs)

II. Implement the School of Education in the Fall Semester of 2017

Note: The planning and program development stages are completed for the School of Education. However, because of budget concerns the Board of Trustees approved the start of the school contingent upon the University raising funds for the first three years of operations.

Enabling Activities to Achieve Objective 2

- A. Board of Trustees approval for implementation with financing contingency
- B. Seek grant funders for the project
- C. Set grant proposal meetings with potential funders
- D. Contract with a grant writer to prepare the grant proposal

Evaluation of the Success of Objective 2

- A. Achieve Board of Trustees approval
- B. Identify and select potential funders
- C. Schedule and host meetings with funders
- D. Prepare and send grant proposal to funders

Financial Status for Objective 2

- A. The School of Education will be \$468,036 to start and operate for the first three years; \$159,000 for FY 2017; \$153,600 for FY 2018; and \$155,436 for FY 2019

Total Cost for Objective 2 - \$468,036 from sponsored programs

III. Re-establish the University Counseling Center

Enabling Activities to Achieve Objective 3

- A. Obtain sufficient staff and space to operate the University Counseling Center
- B. Seek accreditation through the Council for Accreditation of Counseling and Related Educational Programs (CACREP) for University Community Psychology Master's Degree Program
- C. Acquire certification from the Indiana Division of Mental Health, Bureau of Addiction Services

Evaluation of the Success of Objective 3

- A. A Health Education Counseling Center Facility run by Martin University is staffed and implemented in FY 2017
- B. Master's Degree Programs is CACREP Accredited in FY 2018.
- C. Certifications are received to operate facility with capability of receiving state and federal support in FY 2018

Financial Status for Objective 3

- A. Martin University Health Education and Counseling Center (MUHECC) is established by FY 2018 and fully staffed that includes a full time director, full time licensed mental health coordinator, two part-time mental health therapists, one full time receptionist and a half time HSPP for Medicaid and Insurance billing. Cost is \$220,000
- B. CACREP accreditation cost will be \$2000 from operating funds in FY 2018
- C. Facility cost will be \$10,000 annually beginning in FY 2018 from general funds
- D. Certifications cost will \$2,000 annually beginning in FY 2018 from general funds
- E. The renovation of the AJ Brown building space will cost \$20,000 from depreciation reserves

Total cost for Objective 3 for FY 2018 is \$220,000 from Sponsored programs; \$30,000 from general funds and \$20,000 from depreciation reserves

IV. Develop Associate Degree Programs

Enabling Activities to Achieve Objective 4

- A. Request approval from HLC to offer associate degree programs
- B. Implement the two Board approved associate degree programs
- C. Conduct needs analysis to determine what specific degree programs are likely to succeed
- D. Request Board of Trustees approval for new associates degree programs
- E. Develop degree plans and learning outcomes for the recommended programs
- F. Initiate Marketing Program to communicate degree offerings to the community
- G. Enroll students in Associate Degrees programs

Evaluation of the Success of Objective 4

- A. HLC approves offering associate degree by end of FY 2017
- B. Need analysis identifies at least two degree programs to begin offering in FY 2017
- C. Board of Trustee approves new programs
- D. Degree plans are developed in FY 2017 and instructors assigned by FY 2017
- E. At least 20 students are enrolled in the programs by FY 2018

Financial Status for Objective 4

- A. HLC's Institutional Change Request may result in a focused visit cost of \$5,000 that will be funded through general operations
- B. Needs analysis conducted throughout student body (no cost), and mailings to community will cost \$2,000 and funded through general operations
- C. Cost of need analysis is \$2,000 from general funds for time spent by curriculum committee
- D. Degree plans development will cost \$3,000 from curriculum committee
- E. Cost will depend on the associate degree programs added. If the new associate degree programs are in a current bachelor degree subject area, to add two full-time faculty for FY 2018 will be \$138,400 from general funds
- F. Cost from general fund to enroll students for programs will be \$750 per student or \$15,000 for 20 students

Total cost for Objective 4 - Cost \$163,400 from general operating funds

V. Enhance Services for Students

Enabling Activities to Achieve Objective 5

- A. Implement interest inventory and career reviews to enable students to better select a major program suited to their interests and ability
- B. Enhance programs available in the Student Success Center to enable students to receive more comprehensive assistance with academic subjects and increase the numbers of students using the Center
- C. Revise Prior Learning Assessment Program (PLA) to help students determine credits they might obtain through work and career experience early in their academic program
- D. Develop more inclusive curriculum for the First Year Experience course (SSE100) to provide a wide range of topics to help students overcome issues that might cause them to drop out of school. (e.g., finance management, time management, goal setting, etc.)
- E. Revise degree plans and curriculum offerings so students can work more efficiently in cohorts throughout their course work
- F. Request students to write and submit proposals for ways to improve Martin University

Evaluation of the Success of Objective 5

- A. Interest inventories and career reviews are implemented in FY 2016, FY 2017, and FY 2018
- B. Students will report a high level of satisfaction with Student Success Center services in FY 2016, FY 2017, and FY 2018 and show a higher level of use
- C. Revised PLA Program is implemented in FY 2016
- D. First Year Experience course curriculum is revised in FY 2016

- E. Revised Degree Plans are implemented for all incoming students in FY 2016

Financial Status for Objective 5

- A. Cost for interest inventory and career reviews is \$2,000 annually from operational funds
- B. Cost for programs in the Student Success Center is \$7,000 annually from operating funds
- C. Revised PLA Program includes cost of course and adjunct instructor at \$10,000 annually from operating funds
- D. There is no cost associated with revised curriculum
- E. There is no additional cost for revised degree plans

Total Cost for Objective 5 = \$51,000 from general operating funds, \$6,000 from sponsored program funding

Grand Total Three Year Cost for Goal Two = \$995,625 (\$728,475 from sponsored programs and \$267,150 from University general operational funds)

GOAL THREE

Enhance, Expand and Improve Martin University's Campus and Infrastructure

Objectives

I. Renovate and Upgrade the Andrew J. Brown Building

Enabling Activities to Achieve Objective 1

- A. Replace the windows and doors to improve energy efficiency
- B. Replace boilers
- C. Upgrade and renovate restrooms
- D. Improve the handicap accessibility of the building
- E. Upgrade the IT room
- F. Paint the building

Evaluation of the Success of Objective I

- A. Evaluation of the cost of the repairs for the yearly budget has been allocated to the repairs identified in the Brown Building
- B. Evaluation of the cost of the repairs for the yearly capital reserves has been allocated to the renovation projects in the Brown Building
- C. The 40th anniversary capital campaign, has been identified to fund the renovation projects in the Brown Building

- D. Fifty percent of the renovation projects have been completed or have contracts for the work specified in fiscal year 2018

Financial Status for Objective 1

- A. The repair budget allocation is \$21,000 in fiscal year 2016; \$20,500 in fiscal year 2017; and \$21,900 in fiscal year 2018
- B. The reserve allocation is \$34,250 in fiscal year 2016; \$26,250 in fiscal year 2017; and \$23,750 in 2018
- C. The campaign allocation for fiscal year 2018 is \$400,000 - \$90,000 for new windows, \$250,000 for the HVAC, \$20,000 for restrooms, \$10,000 for ADA upgrades, \$10,000 for IT room upgrades and \$20,000 to paint the AJ Brown building

Total Three year cost for Objective 1 = \$63,400 from general funds; \$84,250 from depreciation reserves; and \$400,000 from gifts

II. Build a Fine Arts, Students Activity and Wellness Center

Enabling Activities to Achieve Objective 2

- A. Obtain Board of Trustee approval
- B. Conduct feasibility study for FY 2017
- C. Select an architect in 2017
- D. Conduct a site review in 2017
- E. Develop architectural design in 2017
- F. Seek majors funders in 2017
- G. Conduct a capital campaign in 2018

Evaluation of the Success of Objective 2

- A. Board of Trustees approval obtained
- B. Feasibility study to support the project is completed
- C. Architect selected based on the results of the feasibility study
- D. Site survey and review completed
- E. Martin University has identified the financing source, bank or other financial institution
- F. Five major funders are identified before the start of the project
- G. Funding is identified in the capital campaign for the expenses to start the design project in fiscal year 2018
- H. Contracts for the project are executed in fiscal year 2018

Financial Status for Objective 2

- A. Feasibility study will cost \$20,000 from the general funds, FY 2017
- B. There is no cost for the selection of the architect
- C. The estimated cost of the architectural design is \$50,000 FY 2017

- D. Site survey estimated cost is \$15,000 for FY 2017
- E. There is no cost for the bank selection
- F. Five major funders will give a total of \$10 million to start the project in FY 2018
- G. Estimated investment of \$1,000,000 in fiscal year 2018 to start the project FY 2018 is achieved

Total Three year cost for Objective 2 = \$11,065,000 from gifts and private grants and \$20,000 from general operating funds

III. Complete a Major Repair and Overall of the Main Parking Lot on Station and 22nd Street

Enabling Activities to Achieve Objective 3

- A. Seek bank funding to finance the project
- B. Select architect and contractor
- C. Set schedule and plans to accommodate the work

Evaluation of the Success of Objective 3

- A. Architect is selected
- B. Site survey and review is completed
- C. Funding is identified in fiscal year 2017's capital campaign for the expenses to start the project
- D. Martin University has identified the financing source, bank or other financial institution in fiscal year 2017
- E. The yearly budget has allocated the payment of the principal debt and interest from the financing of the project in fiscal year 2017 and 2018
- F. Ongoing operating expenses are identified and included in the yearly budget projections
- G. Contracts for the project are executed in fiscal year 2017

Financial Status for Objective 3

- A. There is no cost for architect selection
- B. Site survey will cost \$10,000 in FY 2017 from general operating funds
- C. Interest expense of \$19,760 is included in the general expense budget for fiscal year 2017 and \$17,680 in fiscal year 2018

Total Three year cost for Objective 3= \$10,000 from gifts and grants and \$37,440 from general operating

IV. Demolish Structures and Clear Lots of Properties Owned by the University in 2015 and 2016

Enabling Activities to Achieve Objective 4

- A. Generate funding needed for the project
- B. Select the contractor or company to do the work
- C. Set work schedule and plans for project

Evaluation of the Success of Objective 4

- A. Yearly capital reserves in the budget are allocated to the demolition projects
- B. Contracts are executed for the work agreements in fiscal year 2016
- C. Permits are granted by the authoritative agencies

Financial Status for Objective 4

- A. Estimate the use of \$27,000 of the depreciation reserves in fiscal year 2016; \$27,000 in fiscal year 2017; and \$27,000 in fiscal year 2018
- B. There is no cost to execute contracts
- C. Estimate the cost of \$1,500 (\$500 per year) to secure permits

Total Three Year Cost for Objective 4 = \$81,000 from depreciation reserves and \$1,500 from general operating

V. Create New Exterior Signage for the University

Enabling Activities to Achieve Objective 5

- A. Seek grant funds to help change the signage for the University
- B. Obtain approval from the City's Metropolitan Development Department
- C. Select contractor or company to do the new signage for the University
- D. Set plans, dates and logistics for the work

Evaluation of the Success of Objective 5

- A. Funding is identified in the capital campaign
- B. Martin University has identified the additional financing source, bank or other financial institution in fiscal year 2017
- C. Approval is obtained from the Department of Metropolitan Development
- D. The 2018 yearly budget is allocated to pay the principal debt and interest from the financing of the project

- E. Ongoing operating expenses are identified and included in the yearly budget projections for fiscal year 2018
- F. Contracts for the project are executed in fiscal year 2017 for the project

Financial Status for Objective 5

- A. \$10,000 allocation from depreciation reserve FY 2017
- B. \$10,000 from bank note for the completion of the project FY 2017
- C. \$400 in interest payment and \$5,000 in principal payment FY 2017 and FY 2018
- D. \$5,000 in utility and operating costs annually for sign FY 2017 and FY 2018
- E. No cost to execute contracts

Total Three year cost for Objective 5 = \$20,000 from depreciation reserve; \$20,800 from general operating funds

VI. Change the Formal Address of the University from Avondale Place to North Sherman Drive

Enabling Activities to Achieve Objective 6

- A. Conduct a comprehensive planning meeting with all University departments and areas impacted by a change of address-Fall 2015
- B. Work with the City Metropolitan Development Department to start the process-Fall 2015
- C. Contact the appropriate local, state and federal government agencies impacted by the change in address-Fall 2015
- D. Contact the Higher Learning Commission of the North Central Association regarding the change-Fall 2015
- E. Develop a formal schedule for the change-Fall 2015
- F. Create a marketing and public relation initiative announcing the change-Fall 2015

Evaluation of the Success of Objective 6

- A. The University address will be changed by January 1, 2016
- B. A public relations and marketing initiative will start in October 2015
- C. All internal material will change to reflect new address-Spring 2016

Financial Status for Objective 6

- A. Postal agency change cost estimate of \$500-FY 2016 general funds
- B. Postage and marketing material estimate of \$10,000-FY 2016 general funds
- C. Office supplies cost estimate of \$5,000-FY 2016 general funds

Total Three year cost for Objective 6 = \$15,500 from general operating

Grand Total Three year cost for Goal Three = \$168,640 from general operating funds; \$185,250 from depreciation reserves and \$1,465,000 from private gifts and grants

GOAL FOUR

Improve the Quality of Operations, and Working Conditions for Faculty, Staff and Administrative Personnel

Objectives

I. Increase Faculty, Administrative and Staff Salaries by 6% Over the Next Three Years

Enabling Activities to Achieve Objective 1

- A. Raise salaries by 2% in the fall semester of 2015
- B. Raise salaries by 2% in the fall semester of 2017
- C. Raise salaries by 2% in the fall semester of 2018

Evaluation of the Success of Objective 1

- A. Salaries will increase by 2% at the beginning of FY 2016
- B. Salaries will increase by 2% at the beginning of FY 2017
- C. Salaries will increase by 2% at the beginning of FY 2018

Financial Status for Objective 1

- A. Salary increase for FY 2016 will cost \$72,461 (FY 2016 includes one-time salary position increases) and will come from general operating funds
- B. Salary increase for FY 2017 will cost \$70,068 and will come from general operating funds
- C. Salary increase for FY 2018 will cost \$71,159 and will come from general operating funds

Total Three-Year Cost for Objective 1= \$213,688. All of this funding will come from general operational funds

II. Reduce Work Time for Administrators and Support Staff

Enabling Activities to Achieve Objective 2

- A. Revise University benefits schedule to provide administrators spring break week off with pay

- B. Revise University benefits schedule to provide support staff three days off during the Spring Break week with pay
- C. Modify faculty responsibilities to increase assistance with educational/program management

Evaluation of the Success of Objective 2

- A. University administrators will have spring break week off with pay in FY 2016, FY 2017, and FY 2018
- B. Support staff will have three days off during the spring break week with pay in FY 2016, FY 2017, and FY 2018
- C. Faculty responsibilities will include increases in providing educational/program management assistance beginning FY 2016

Financial Status for Objective 2

- A. Administrators and support staff being off during spring break week with pay will cost the University \$33,174 in FY 2016; \$33,837 in 2017; and \$34,514 in 2018. This amount will come from general operational funds
- B. There is no foreseeable cost to the University for faculty providing educational/program management assistance

Total Three-Year Cost for Objective 2 = \$101,525. All of this funding will come from general operational funds

III. Increase the Number of Faculty to Enhance Academic Support and Expansion of Programs

Enabling Activities to Achieve Objective 3

- A. Hire faculty when new program enrollment increases by 25 student FTE
- B. Hire faculty when existing program enrollment increases by 30% FTE and/or when new areas of knowledge are needed for specific programs

Evaluation of the Success of Objective 3

- A. A full-time faculty member will be hired whenever overall University enrollment increases by 30% annually throughout the implementation of the 2016-2018 strategic plan
- B. A full-time faculty member will be hired when the School of Education enrollment accommodates two cohort groups of 30 or more students in FY 2018
- C. A full-time program-specific faculty member will be hired when program enrollment increases by 25 FTE or more students throughout the implementation of the 2016-2018 strategic plan

Financial Status for Objective 3

- A. Full-time faculty annual cost to the University is \$65,000 (includes benefits) for FY 2017 and \$65,000 (includes benefits) for FY 2018. These positions will be funded from general operational funds
- B. Full-time faculty member annual cost to the University for the School of Education is \$65,000 (includes benefits) for FY 2018 and will be funded through sponsored programs

Total Three-Year Cost for Objective 3 = \$160,000; \$65,000 from sponsored program funds and \$130,000 from University general operational funds

IV. Professional Development for Faculty, Staff and Administrative Personnel

Enabling Activities to Achieve Objective

- A. Create a calendar of professional development topics
- B. Provide on campus professional development activities
- C. Seek funding for off campus professional development activities

Evaluation of the Success of Objective 4

- A. An annual calendar of professional development topics will be created for FY 2016, FY 2017, and FY 2018
- B. Faculty, staff and administrators will attend a minimum of 6 on-campus professional development activities each FY of the strategic plan
- C. The University will obtain sponsored program funding for 10 personnel to attend at least one off-campus professional development activity each FY of the strategic plan

Financial Status for Objective 4

- A. There is no significant cost to create, publish and circulate the faculty, staff and administrator development calendar
- B. There is no significant cost associated for faculty, staff and administrators to attend a minimum of 6 on campus development sessions
- C. The cost for off campus professional development activities to the University is \$15,000 annually X 3 years = \$45,000

Total Three-Year Cost for Objective 4 = \$45,000. The amount will be secured from sponsored programs

Grand Total Three-Year Cost for Goal Four = \$620,213 (\$175,000 from sponsored programs and \$445,213 from University general operational funds)

GOAL FIVE

Enhance the University's Engagement and Services to the Community

Objectives

I. Increase Community Advocacy and Engagement

Enabling Activities to Achieve Objective 1

- A. Continue Martin University's NASA SEMAA program
- B. Provide on-campus space for organizations to provide community-related services
- C. Strengthen working relationships with Martindale-Brightwood community organizations
- D. Develop working relationships with area businesses
- E. Develop working relationships with area churches
- F. Provide on-campus career development workshops/seminars to community members

Evaluation of the Success of Objective 1

- A. The NASA SEMAA program will provide STEM enrichment activities to a minimum of 75 area youth in FY 2016, FY 2017, and FY 2018
- B. The University will provide on-campus space free of charge for a minimum of three outside organizations to provide community-related service in FY 2016, FY 2017, and FY 2018
- C. The University will provide on-campus space free of charge to the Martindale-Brightwood Community Center to host their annual dinner in FY 2016
- D. A Martin University employee will serve on the Martindale-Brightwood Community Development Corporation by the end of FY 2016
- E. Martin University will have representation on the One Voice Community organization by the end of FY 2016
- F. A Martin University employee will serve on the Board of Directors of the Our Brother's Place and Our Sister's Place by the end of FY 2016
- G. Martin University will have representation in a minimum of three (3) community organizations by the end of FY 2017 and six (6) community organizations in FY 2018
- H. Working relationships will be developed with a minimum of 100 local businesses that can provide internship/mentoring activities for University students in FY 2016, FY 2017, and FY 2018
- I. Martin University will develop working relationships with a minimum of three (3) local churches in FY 2016, six (6) churches in FY 2017, and nine (9) churches FY 2018
- J. Career development workshops/seminars will be hosted on the University campus and open to the community in FY 2016, FY 2017, and FY 2018
- K. Each academic program will have identified a minimum of at least one community person working in the program area of study who will provide consultation and review of the career development program and its preparation of students for careers in the program's area of study by the end of FY 2017

Financial Status for Objective 1

- A. Continue Martin University's NASA SEMAA program: Annual cost to University is \$67,500 for a three-year total of \$202,500. This funding will come for sponsored programs; 21st Century FY 2016 and FY 2017, TBD for FY 2018
- B. Provide on-campus space for organizations to provide community-related services. Annual cost is \$2,785 X 3 spaces X 3 years = \$25,065. This funding will come out of general operation funds (i.e., \$8,355 annually)
- C. Strengthen working relationships with Martindale-Brightwood community organizations. No foreseeable cost to the University in FY 2016, FY 2017, or FY 2018
- D. Develop working relationships with area businesses. No foreseeable cost to the University in FY 2016, FY 2017, or FY 2018
- E. Develop working relationships with area churches. No foreseeable cost to the University in FY 2016, FY 2017, or FY 2018
- F. Provided on-campus career development workshops/seminars to community members. Estimated cost is \$1,000 per event @ 2 events/year X 3 years = \$6,000. Funding for these events will come from sponsored programs; Lilly Foundation in FY 2016 and FY 2017; TBD for FY 2018

Total Three-Year Cost for Objective I = \$233,565 (\$208,500 from sponsored program funding, \$25,065 from University general operational funds)

II. Contribute Leadership to the Development of a Martindale-Brightwood Education Zone

Enabling Activities to Achieve Objective 2

- A. Reorganize/enhance the Martin University Early Childhood Education Program.
- B. Create Martin University School of Education
- C. Create Martindale-Brightwood Educational Zone Task Force
- D. Develop/implement program for Martindale-Brightwood infants through age two that facilitates learning
- E. Develop/implement program for Martindale-Brightwood youth ages three through five that facilitates learning
- F. Develop/implement full-day kindergarten program for Martindale-Brightwood age five youth

Evaluation of the Success of Objective 2

- A. The Martin University Early Childhood Education Program will be reorganized and enhanced by the end of FY 2016
- B. The Martin University School of Education will be operational in early FY 2017

- C. A Martindale-Brightwood Educational Zone Task Force will be identified by the end of FY 2016 and have representation from:
- Local, state, and federal governmental levels
 - Indianapolis Public Schools
 - The Martindale-Brightwood Community Development Corporation
 - The United Way of Central Indiana
 - NAACP
 - Urban League
 - Indianapolis Recorder
 - Indianapolis Star
 - ministerial organizations
 - Concerned Clergy
 - Indianapolis Metropolitan Police Department
 - Marion County Health Department and local social service agencies
 - Childcare providers in Martindale-Brightwood community
 - Local community centers
- D. Working relationships with local healthcare providers will be established in FY 2017
- E. Expecting mothers in the Martindale-Brightwood community will be identified by FY 2017
- F. Monthly visitation and education of expecting mothers on preparing infant and very young children to learn will be implemented in FY 2017
- G. Educational programming of Martindale-Brightwood children ages three to five will be implemented in FY 2018
- H. A full-day kindergarten program for Martindale-Brightwood five-year-old children will be implemented in FY 2018

Financial Status for Objective 2

- A. The cost of reorganizing/enhancing the Martin University Early Childhood Education Program by the end of FY 2016 is \$60,219 and includes personnel, fringe benefits, and supplies. These funds will come out of Martin University's general operational funds annually
- B. The cost of implementing the Martin University School of Education is \$468,036 for the first three years and includes personnel/instructors, fringe benefits, professional development, supplies, resource materials, printing, marketing/promotional materials and testing/evaluation. This funding will be secured from grants and gifts
- C. The cost for Martin University to participate in Martindale-Brightwood Educational Zone Task Force is \$12,500 (\$50,000 personnel @ 25%FTE) X three years = \$37,500. These funds will come out of Martin University's general operational funds annually
- D. A program for Martindale-Brightwood infants through age two that facilitates learning will be implemented. The cost of implementing this service will be provided by entities outside of Martin University. The University will incur no additional cost other than the University personnel representation on Martindale-Brightwood Educational Zone Task Force identified in "C" above

- E. A program for Martindale-Brightwood youth ages three through five that facilitates learning will be implemented. The cost of implementing this service will be provided by entities outside of Martin University. The University will incur no additional cost other than the University personnel representation on Martindale-Brightwood Educational Zone Task Force identified in “C” above
- F. A full-day kindergarten program for Martindale-Brightwood age five youth will be developed and implemented. Martin University’s portion of this program is estimated to be \$100,000 in FY 2018 and includes personnel, space, and supply costs for implementing a full-day kindergarten program on the University’s campus. This funding will be secured from sponsored program sources

Total Three-Year Cost for Objective II = \$97,719 (\$97,719 from University general operational funds)

III. Develop a Utility Program to Educate and Employ Martin Students Enabling Activities to Achieve Objective 3

- A. Create a partnership with a utility maintenance and works company
- B. Develop an educational program that leads to an associate and/or bachelor degree in utility management Arboriculture/Tree Trimming
- C. Develop a bachelor degree program in Applied Science with concentrations in Electrical Line Construction, Arboriculture/Tree Trimming and Gas/Water Apprentice Preparation
- D. Obtain Board approval for the Utility Arboriculture/Tree Trimming and the Electric Line Construction and Applied Science bachelor degree programs (Note: The Applied Science Curriculum Core will enable us to diversify the utility degree programs by adding the specific skills and mandated courses with the Applied Science Core as the foundation. This could allow at least three degree programs, Arboriculture/Tree Trimming; Electric Line Construction and Repair; and Gas and Water Apprentice Preparation).
- E. Develop a relationship with a utility industry employer to create internships, apprenticeships and advisory councils
- F. Create a student apprentice company for tree trimming and training by a partner utility works company
- G. Create a legal partnership with our partner utility maintenance works company to earn funds for scholarships for Martin students and operational needs of the University

Evaluation of the Success of Objective 3

- A. Obtained Board approval for the program
- B. Achieved a legal partnership with a utility maintenance and works company
- C. Developed fully the degree programs in Applied Science with concentration on Arboriculture/Tree Trimming, Electric Line Construction fully developed by 2018
- D. Obtained a relationship with a major utility industry employer for internships, apprenticeships and advisory councils

- E. Created an apprentice company for tree trimming with all legal components included, e.g. insurance, not for profit/for profit relationship defined, roles and obligations, etc.
- F. Achieved a program that is educating students, providing utility training and obtaining jobs for students

Financial Status for Objective 3

- A. The utility maintenance and works company would plan and work with the University to solicit and/or raise funds for the cost of the apprentice company's tree trimming equipment, operations and insurance costs
 - Equipment Cost for Three (3) Crews (15 persons per crew)-\$463,000 from gifts and grants
 - 1 Truck-\$175,000
 - 1 Bucket Chip Vermeer-\$70,000
 - 1800 Chipper-\$25,000
 - Tools (saws, hammers, etc.)-\$4,500 (\$100/person x 45)
 - Safety Clothing-\$13,500 (\$300/person x 45)
 - 128 Horse-powered Fecon Mower-\$75,000
 - 1-70 feet skidder-\$100,000
 - B. Legal Fees for Partnership-\$9,000 from gifts/grants FY 2017
 - C. Create degree program-\$3,500 general operating funds FY 2017
 - D. Increase in insurance policy \$40,000 (\$20,000 per year) – general operating fund FY 2017 and 2018

Total Cost for Company for Objective 3=\$515,000 (472,000 from gifts/grants and \$43,500) general operating funds

Grand Total Three-Year Cost for Goal Five = \$946,284, \$308,500 from sponsored programs, \$472,000 in gifts/grants, and \$165,284 from University general operational funds.

Cost Breakdown and Reconciliation of the total cost for the Strategic Plan 2016 to 2018

	Fiscal Year	Goal 1	Goal 2	Goal 3	Goal 4	Goal 5	Totals
General Funds	FY 2016	487,900	17,000	41,500	105,635	81,074	733,109
	FY 2017	582,700	17,000	76,660	168,905	64,355	909,620
	FY 2018	593,300	233,150	50,480	170,673	20,855	1,068,458
Sponsored Programs	FY 2016	205,500	2,000	-	15,000	69,500	292,000
	FY 2017	218,630	161,000	-	15,000	69,500	464,130
	FY 2018	235,549	565,475	-	145,000	169,500	1,115,524
Gifts	FY 2016	-	-	-	-	-	-
	FY 2017	-	-	65,000	-	472,000	537,000
	FY 2018	-	-	11,400,000	-	-	11,400,000
Depreciation Reserve**	FY 2016	-	-	61,250	-	-	61,250
	FY 2017	200,000	-	63,250	-	-	263,250
	FY 2018	200,000	20,000	60,750	-	-	280,750
	Total Cost per Goal	2,723,579	1,015,625	11,818,890	620,213	946,784	
					Total Cost of the Strategic Plan		17,125,091

****Depreciation Reserve Reconciliation**

	FY 2016	FY 2017	FY 2018
Reserve (Estimates)	502,000	540,000	540,000
Bond payment	215,000	235,000	245,000
Strategic Plan	61,250	263,250	280,750
Balance (Cumm. total)	225,750	267,500	281,750

Note: Depreciation reserve is the financial depreciation of assets over the life of the assets. The depreciation reserve or accumulated depreciation is a non-cash expense to the financial statement. This cash is a reserve that may be used to reinvest back into the business.

This Plan was created by Martin University and authorized
by the Martin University Board of Trustees

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