“DISTINCTIVE EXCELLENCE”

THE FUTURE OF
SAINT MARY’S COLLEGE

Town Hall Meetings
President James A. Donahue
May 6 & 7, 2015
Saint Mary’s College of California will be the leading Catholic comprehensive university in the western United States – known for its academic excellence, foundation in the liberal arts, ethical leadership for a just society and the common good, integrative and collaborative learning, and distinctive transformative education for students.
Mission

The College’s existing mission statement celebrates its three traditions, the classical tradition of liberal arts education, the intellectual and spiritual legacy of the Catholic Church and the vision of education enunciated by Saint John Baptist de La Salle and developed by the Brothers of the Christian Schools and their educational institutions for more than 300 years. This strategic plan extends the application of that mission even further into the 21st century as described below.

**Characteristics of SMC’s Mission:** The identity of Saint Mary’s College of California is built on three core commitments.

- **The Liberal Arts Tradition**
- **Our Catholic Identity**
- **Our Founding Lasallian Heritage**
STRATEGIC GOALS

1. Raise the Academic Profile and Distinction
2. Support the Student Lifecycle
3. From De La Salle to Lasallian
4. Prioritize Facilities and Footprint
5. Get the Message Out
6. Ensure Saint Mary’s Financial Stability
Anticipated Outcomes in the First Two Years
1. Raise the Academic Profile and Distinction

- Establish post-doctoral fellow teaching positions and student research assistantships
- Support collaborative courses and research on shared inquiry
- Secure funding for a new Library & Learning Commons
- Provide additional travel scholarships
- Increase amount of instruction offered by ranked faculty (through increasing numbers)
- Publish annual review of faculty scholarship
- Begin the planning, modernization and renovation of academic buildings
2. Support the Student Lifecycle

- Research, plan and develop a college resources mobile app
- Support graduate and undergraduate student programming to promote a 24/7 campus
- Develop architectural plans and begin the modernization and renovation of residence halls and student activity spaces
3. From De La Salle to Lasallian

- Establish a Mission Leadership Team to advise on promotion and integration of the College's three traditions

- Mobilize Lasallian educators, both faculty and staff, to offer mission education to departments and centers throughout the College

- Begin implementing a slate of initiatives to enhance the Catholic identity of the College, including creating a Board of Trustees mission committee and enhancing the work of the Cummins Institute
4. Prioritize Facilities and Footprint

- Complete the new Campus Master Plan
- Begin construction of new academic office and instructional spaces
- Accommodate parking needs in conjunction with construction of new facilities
- Begin construction of phase one of the Student Athlete Performance Center
5. Get the Message Out

- Develop and launch an integrated brand campaign
- Hire a marketing manager to support enrollment marketing
6. Ensure Saint Mary’s Financial Stability

- Develop revised expectations to ensure annual philanthropic participation for all boards, committees and advisory groups
- Redefine and develop new alumni engagement strategies
- Improve alumni and donor support for institutional goals and priorities
- Develop a financial aid philosophy
- Develop five-year enrollment management plan
- Develop and implement a workforce planning process for staff positions
- Initiate the next strategic plan for intercollegiate athletics and recreational sports
Dashboard: Promoting the Vision of SMC's Strategic Plan 2015-2020

Key Performance Indicators

- **KPI 1**: Leading Catholic University
- **KPI 2**: Academic Excellence
- **KPI 3**: Distinction
- **KPI 4**: Fiscal Sustainability
- **KPI 5**: Transformative Education
Leading Catholic University

KEY METRICS:
1. Positive perceptions of the College’s Catholic identity and academic quality
2. Increased national recognition of quality in Catholic higher education
KPI 2

Academic Excellence

KEY METRICS:
1. Percent of instruction offered by ranked faculty
2. Increase in faculty and student-faculty collaborations
3. Increase in and publication of faculty achievements
KPI 3

Distinction

KEY METRICS:
1. Student participation in collaborative activity with faculty
2. Improved student engagement scores
3. Graduate/professional school and job placement
Fiscal Sustainability

KEY METRICS:
1. Increased alumni/donor support
2. Meet strategic enrollment and financial aid goals
3. Strategic reallocation of existing funds
Transformative Education

KEY METRICS:
1. Increased experiential learning opportunities, such as internships, study abroad, community engagement, campus organizations
2. Increased mission engagement
3. Student satisfaction with career preparation
Funding Sources for Strategic Plan Implementation

Implementation funding sources estimated at $103.9 million through FY 2019-2020

Implementation will bring to bear all College resources and seek new resources

Funding from College operating budget sources integrated with five-year budget projections
Operating Budget Funding Sources

- Strategic initiative allocations (one-time and ongoing)
- Reallocation of funds currently budgeted (includes restricted and discretionary funds)
- Carry-over excess net revenue (from prior years)
- Plant Fund transfers (depreciation expense)
- Excess net revenue currently budgeted (future years)
Additional Funding Sources

Undergraduate enrollment growth and net revenue growth from Graduate and Professional Programs (beyond current budget projections)

Fundraising (primarily capital projects)

New revenue sources (grants and fees)

Issuance of debt (offset by related fee revenue)
Funding Uses for Strategic Plan Implementation

Implementation funding for uses estimated at $103.7 Million through 2019-2020

Funding for uses commences in FY 2014-2015 with majority of uses funded in subsequent fiscal years

Spending phased and authorized as funding sources become available

Funding for uses monitored and adjusted annually based on actual results and changing circumstances
Sources of Funds
$103,856,755

Fundraising
$60,930,000
58.67%

Operating Budget Allocations
$3,368,000
3.24%

Reallocations of Funds Currently Budgeted
$6,529,453
6.29%

Plant Fund Transfer
$12,500,000
12.04%

Undergraduate Enrollment Growth
$4,616,000
4.44%

Carry-over Excess Revenue from Prior Year
$2,500,000
2.41%

Increased Net Revenue from Graduate and Professional Programs
$880,000
0.85%

New Revenue from External Grants
$2,153,302
2.07%

New Revenue Sources
$380,000
0.37%

Debt Issuance
$10,000,000
9.63%

Total
$103,856,755
QUESTIONS & COMMENTS