



# Strategic Planning Handbook



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## Identity and Vision

*Azusa Pacific University is an evangelical Christian community of disciples and scholars who seek to advance the work of God in the world through academic excellence in liberal arts and professional programs of higher education that encourage students to develop a Christian perspective of truth and life. APU Mission Statement*

APU strives to be an exemplary university that is Christ-centered and evangelical, recognized for excellence that honors God through transformational scholarship, life-giving community, and selfless service. As a leading Christian institution, Azusa Pacific University claims scholarship as core to its mission and one of its Four Cornerstones. APU is firmly committed to graduating men and women who seek to positively change the world in the name of Christ. The process of engaging students in studies requires an immersion of both faculty and students in a vital institutional culture that values, supports, and fosters the ongoing processes of scholarship and teaching in an environment of academic freedom. With students as our first priority, we seek the development of the highest quality academic programs that honor God.

As an evangelical Christian university, APU affirms the supremacy of Christ in all areas of life. These beliefs and values exist at the core of the university. The Statement of Faith, Mission Statement, Statement of Essence, Four Cornerstones, and Motto of Azusa Pacific University provide a solid foundation on which to build positional statements of the institution as an evangelical Christian university. These documents, compiled in a single booklet entitled “*What We Believe*” ([http://www.apu.edu/live\\_data/files/1/institutional\\_values.pdf](http://www.apu.edu/live_data/files/1/institutional_values.pdf)) evidence a strong Christian commitment and form the core of the increasingly far-reaching nature and scope of the APU community. They give expression to a strong, clear, unswervingly evangelical Christian worldview that permeated the university and guides its activity. As its guiding center, the university is able to grow more effectively in the confidence that its Christian nature will flourish.

The documents that have been part of the growing history of APU serve as a cohesive core. Each evolves from the other, providing consistency and natural coordination that demonstrates the university’s worldview as thoroughly Christian. The university identity is the foundation of the strategic planning process at the university. The strategic planning process enables the university to move in the same direction, so the institution operates in dynamic harmony, facilitating a congruence of purpose and mission.

### University Strategic Priorities and the APU Shared Vision 2022

In September 2011, President Jon Wallace shared with the APU community the “Shared Vision 2022”. This announcement was preceded by a year-long journey commissioned by the Board of Trustees for the president to engage in conversation with others and in prayerful introspective to better understand the context of academics now and in the future, to affirm our mission and unique place as a faith-based university, and to more fully understand how APU can equip our graduates to serve God in the world. From these learning’s the President, with the support of the Board of Trustees developed the following vision statement:

*APU will be a premier Christian university and a recognized leader in higher education, a city on a hill that reflects the life of Christ and shines the light of Truth.*

There are four components to the APU Shared Vision 2022:

### **Mission**

*Goal: We will nourish and advance our Christ-centered mission.*

- We will submit to the Lordship of Christ and the authority of Scripture while wrestling with controversial ideas, difficult issues, and vexing questions.
- The university community will support, sustain, and affirm the APU identity, values, and ethos.
- Every student will be taught from an evangelical Christian worldview, developing their mind and shaping their character.
- We will continue to partner with and serve the Church in the redemptive work of God in the world.
- We will aspire to develop disciples and scholars with intellectual and moral virtue, who are active locally, nationally, and globally, making a transformational impact on culture and society.

### **Academic Reputation**

*Goal: We will have an academic reputation of excellence.*

- We will be experts in faith integration, across every program and discipline.
- We will affirm, celebrate, and reward strong and effective teaching and instruction while we continue to build a culture of scholarship.
- We will actively engage the world in exploring God's Truth through research and scholarship.
- We will advance God-honoring diversity and internationalization in teaching and scholarship.
- We will be a preferred destination for gifted faculty and students.

### **Valuing People**

*Goal: We will acknowledge that people (student, faculty, and staff) are created in the image of God and value them as the university's most important resource.*

- We will develop and maintain the highest standard of student (customer) service so that we are "student centered."
- We will be an outstanding workplace and a preferred destination for employment, attracting, retaining, and developing an intergenerational and diverse world-class faculty, staff, and board, distinguished by their engagement with the APU mission.
- We will implement intentional development of people at all levels of the university, building capacity for excellence, both now and in the future.
- We will develop effective and efficient systems, promoting a mission- focused community.

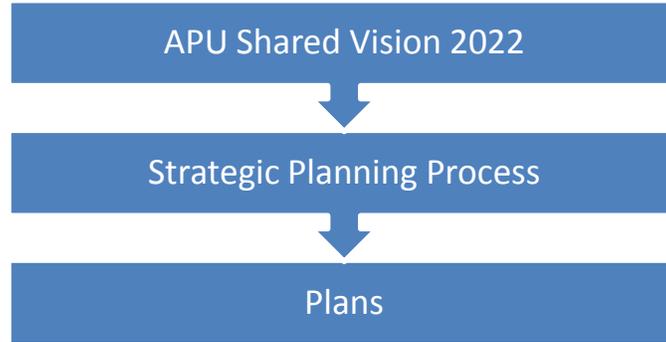
### **Financial Excellence**

*Goal: We will be a financially strong institution capable of fulfilling our mission.*

- We will develop innovative models for accessibility and affordability, supporting growth and financial stability.
- We will maintain an appropriate and resilient capital structure with a strong balance sheet.
- We will accomplish a comprehensive campaign to support and advance our vision and mission.
- We will advance APU through responsible, comprehensive enrollment strategies, matching relevant academic programs with diverse student populations.

This new Shared Vision 2022 provides inspiration and clarity to the direction of the university board of trustees, administration, faculty, staff, and students. The components of the vision identify the strategic priorities, bringing deeper clarity and direction to the future of the university. The university strategic priorities define institutional purposes and ensure objectives of the university are met by the plans initiated by various university stakeholders (e.g. administration, academics, co-curricular and operations) (Figure 1). These priorities are the strategic themes guiding the university forward.

Figure 1



### Overview of the APU Approach to Strategic Planning and Decision-Making

Strategic planning and decision-making provides administrative structure and process to determine, attain, and maintain the mission and vision of the university. The APU Shared Vision 2022 and its four themes serve as the guide for strategic planning. Within the organizational structure, varying administrative groups are responsible to maintain the strategic focus of the university and ensure decisions are congruent with the vision and themes. These groups represent all aspects of the university. The following discussion provides an overview of the various administrative groups engaged in the strategic decision making process. Simply stated, all planning processes fall under the purview of the Board of Trustees and the Office of the President. The 3-year planning process with annual revision functions occur through reciprocal interaction between the members of the President’s Council and the areas they oversee at the university (Figure 2). Membership in the President’s Council is representative of the four primary divisions of the university: administration, academics, co-curricular and operations. The roles and planning processes of these four areas are described below.



Figure 2

## **Administration: Board of Trustees and President's Office**

### **The Role of the Board of Trustees**

Designated as the “keepers of the university mission”, the Board of Trustees provides clarity and direction to the president and administration. In order to ensure macro-level perspective on the vision and goals of the university, the full board meets three times per year and performs their work in select committees. This committee work enables each board member to fully engage in dialogue and provide the needed perspective on the goals of the university.

The Board of Trustees meets physically three times in a calendar year (January, May and September). The trustees consider any proposal from the administration for edits or changes to the Mission, Vision and Values of the university (the "University's Identity") in the May annual general meeting. This ratification of identity and strategic priorities is the annual opportunity for the administration or the trustees to review formally the university mission, vision, values and strategic priorities. This review informs processes within the Annual Planning Cycle (Appendix 1) where the strategic priorities are translated into the institutional planning events.

### **The Role of the Office of the President**

In order to ensure strategic prioritization, the Office of the President provides an initial filter on new university initiatives and competing priorities. Academic and non-academic initiatives are brought forward via the Academic Cabinet (AC) and by members of the President's Council to the president for review at the administrative level. This filter evaluates new initiatives against strategic priorities and university vision. Data, critical decisions, and operationalization of priorities are integrated into the university priorities through the Office of the President. Once vetted, strategic communication, measurements, and prioritization of initiatives are operationalized within the normal work system, sustaining new efforts within the university.

Central to the Office of the President is the group comprised of the president and the three individuals who report directly to him (the provost and two executive vice presidents), commonly called the President's Direct Reports (PDR). The PDR meets weekly to coordinate the functions of their areas and to ensure a common understanding of the university vision and direction. The four strategic priorities have each been assigned to a member of the PDR for oversight: People (president), Academic Reputation (provost), Mission (executive vice president), and Financial Excellence (executive vice president). Corporately, the group oversees the entire strategic planning process and university operations to align with the vision.

### **The Role of the President's Council**

The President's Council, the advisory council to the president consists primarily of members of the Office of the President and the Academic Cabinet. Monthly this council meets to discuss university-wide issues or direction in supporting the President in the leadership of the university. This council meets for an extended time annually for strategic priority discussions and direction in late May/early June of each year and in late August. At these times the strategic priorities and direction from the May Board of Trustees meeting are considered, informing the Annual Planning Cycle (Appendix 1). Specific outcomes are: (1) Clarity on the strategic initiatives and focus of the university, and the implications for the upcoming academic and financial year, (2) Alignment and if appropriate integration with the Academic

vision, goals, and objectives, (3) Updated comprehensive 3-year plan, and (4) discuss operational leadership for collating the strategic priorities and objectives.

## Academics

### The Role of the Provost

As the individual responsible for all activities related to the academic enterprise of the University, the provost oversees and monitors all academic programs, teaching, and research. This overall review and supervision is carried out through a) interaction with (and periodic review of) the deans of each school, b) working with faculty directly through various committees and groups, and c) representing the University to the external community of interest in matters relating to the academic enterprise.

The provost provides strategic academic vision for the university, as well as oversees all academic matters including hiring new faculty, working with Academic Cabinet and faculty to develop new programs and setting academic policy.

### Academic Vision 2022

In September 2011, Provost Mark Stanton released the Academic Vision 2022 for APU. This vision was created with support from President Wallace and the Academic Cabinet to articulate the academic vision within the university vision and plan strategically to achieve that vision. The provost conversed with the president around potential university vision areas and their reciprocity with academics. This ensured a coordinated and collaborative vision for the entire university. The provost engaged the Academic Cabinet in the formation of the academic vision and the selection of specific goals and objectives to achieve the vision. Elements of these goals and objectives have been translated into measurable outcomes and will be tracked on a dashboard using standardized metrics (instruments, instrument items, standard data sets/IPEDS data, etc.). The overarching objective is to raise APU's academic reputation as a high-quality, comprehensive university. Ten objectives highlight important commitments necessary to achievement of that objective:

#### **Raise APU's Academic Reputation as a High-Quality, Comprehensive University** *Cultivate a culture of trust and collaboration in the pursuit of excellence*

- AV1. Employ decision-making processes that are both **strategic and innovative**.  
*Actively consider new opportunities and goals through careful needs assessment and planning.*
- AV2. Ensure **data-based information** is integrated into all decision-making processes.  
*Develop and utilize accurate data in the etiology and refinement of goals and initiatives.*
- AV3. **Support faculty and student research**.  
*Create benchmarks for faculty and student scholarship and provide resources with accountability to achieve those goals.*
- AV4. Ensure that a **cogent understanding of faith integration and spiritual formation** is integrated into all academic programs.  
*Establish clear definitions and expectations regarding fulfillment of our mission as a Christian university.*
- AV5. Continue our commitment to **God-honoring Diversity** as evidenced by respect that values all individuals.  
*Affirm and sustain our Christian commitment that all people are created in the image of God in our academic endeavors.*

- AV6. Cultivate **faculty expertise** as educator-mentors, scholar-practitioners, and servant-leaders.  
*Advance faculty developmental processes to support the central role of faculty in higher education.*
- AV7. Engage in the **continuous improvement of student learning**.  
*Develop and employ resources and processes that facilitate student academic engagement and thriving.*
- AV8. Ensure programs and processes are employed to promote **undergraduate excellence**.  
*Uphold our commitment to a liberal arts education with distinction.*
- AV9. Enhance services and support that facilitate **distinction in graduate and adult education**.  
*Provide resources appropriate to the academic needs of adult and graduate students.*
- AV10. Pursue **intentional internationalization**.  
*Provide significant opportunities for cross-cultural and cross-border academic experiences.*

### **The Role of the Academic Cabinet**

The Academic Cabinet, chaired by the provost, is comprised of the deans of the schools and colleges, the vice provosts, the vice president for graduate/non-traditional enrollment and student services, the vice president for enrollment management, the associate provost for the Center for Teaching, Learning & Assessment and the accreditation liaison officer. The Academic Cabinet engages in strategic planning concerning the academic issues of the university. This includes planning for new programs and coordination of the academic elements of the university vision. The Academic Cabinet is the academic governing body that reviews and approves all new academic initiatives and new program proposals, moving a program to a new site, creating a new international site or regional center, name changes to a program, converting a face-to-face program to a new distance education program or correspondence education program and developing new dual or joint degree programs (see OCS website for Forms E, F, and L and O).

### **The Role of the Dean**

Deans are appointed by the provost in consultation with the president of the university. Deans report to the provost and are responsible for the functioning of all aspects of the schools/college, including personnel (faculty and staff), curriculum, assignments, equipment, and recruitment of faculty and staff. Based on their awareness of academic trends and their applicability to APU in light of its mission and goals, the dean is responsible for responsible for strategic planning, program review processes, accreditation, budget-planning, preparation, and control for their respective school/college. As budgetary managers of a school/college the dean is responsible for ensuring the delivery of high quality general education and professional programs, approving all new faculty positions, approving development of new programs and initiatives, and ensuring ongoing programs and initiatives are fiscally responsible and remain consistent with the values and mission of the university. On an annual basis, deans engage their department chairs in the strategic planning process. The outcomes of these processes are shared by the deans to the Academic Cabinet.

### **The Role of the Chair**

After consultation with the provost, the dean of each school/college appoints department chair(s) annually for a one-year term. The chair reports to, and is responsible to, the Dean of the school/college in which the department resides. The chair is responsible for the quality of teaching and effectiveness of courses and programs in the department. The chair assists in faculty recruitment, faculty evaluation, and faculty professional growth. This includes monitoring of, and full participation in, the faculty evaluation process. The chair initiates and coordinates curriculum evaluation, revision, and improvement, program

review, accreditation requirements, and assists in budget preparation for the department in relation to these programs. The chair monitor and operates within the departmental budget, ensuring that teaching loads, course offerings, faculty assignments, and office activities operate in a manner consistent with budgetary allocations. The chair engages in strategic planning with the dean, and ensures that faculty contribute to the strategic planning process and the development and evaluation of strategic initiatives.

### **The Role of Faculty**

The strategic planning process at the faculty department level focuses on collaborating with the dean and chair to vision new academic programs, developing program proposals that have been approved by Academic Cabinet, and increased capacity and effectiveness of existing programs through development of course proposals and/or recommending changes to current course offerings. Typically, faculty within a given department identify strategic needs through one of several avenues: the annual strategic planning review process, the annual program assessment process, program review that occurs every five to seven years (and/or professional accreditation processes, if applicable), or an independent needs assessment, market analysis, or alumni/employer survey. When the faculty and chair within a department have identified a programmatic need, the department chair requests that his or her dean submit a preliminary proposal to the Academic Cabinet for review and approval (see OCS web pages Form A, E & F discussed later in this document regarding the curricular review and approval process and the various forms used in the approval process).

### **The Role of Faculty Governance**

The Faculty Senate and its related Councils are partners with the Academic Cabinet and the President's Council in furthering the strategic initiatives and academic vision of the university. As partners in the process, the initiatives may begin at the faculty/department level or the administrative level, and along the path to implementation, are subject to review and input by a variety of parties (see Form A: Provost Curricular Review and Approval Process). As described previously, the Academic Cabinet is responsible for approving new programs, new sites, and converting current programs to new distance learning modalities. Once approved by Academic Cabinet, the development of the curricula and ensuring educational effectiveness of the curricula is the unique purview of faculty and the faculty governance approval processes. For all new programs, new courses and changes in current curricular offerings, the curricular and student learning outcomes, assessment of learning outcomes, and ensuring alignment of student outcomes with programmatic goals are subject to the approval of the respective faculty councils under the Faculty Senate. The Office of Curricular Support works with department faculty to ensure required curricular forms are completed and distributes the completed forms to the appropriate faculty council (Undergraduate Studies Council, Master's Studies Council, or Doctoral Studies Council). A detailed summary of the steps in the educational effectiveness approval process are outlined in Form A – Stage 3 and educational effectiveness forms are presented in Forms G-K (see OCS web pages). Approval of curricular changes are reflected in council meeting minutes. Faculty Councils submit their meeting minutes to the Faculty Senate for approval. As outlined in the Office of the Provost: Curricular Review and Approval Process (Form A), the provost and Academic cabinet are notified by the OCS when new programs or initiatives have completed the faculty governance approval process, and then the OCS proceeds to notify a variety of other departments on campus that will be impacted by the curricular change.

The academic program review process, which is under the purview of the Faculty Senate through its representative councils (Undergraduate Studies Council, General Studies Council, Master's Studies Council, and Doctoral Studies Council), provides a regular cycle of strategic planning as part of program

review. All departments are on a 5-7 year cycle to complete a program review that contains recommendations for strategic planning, which are affirmed by the respective faculty council and reviewed through the faculty governance process. The respective dean and chair are responsible for incorporating recommendations from the annual program review into the annual review and revisions of the departmental strategic plan.

### **The Role of the Office of Curricular Support (OCS)**

Employing decision-making processes that are both strategic and innovative is identified as a key goal in the Academic Vision 2022. To support academic decision-making processes related to new initiatives, new programs, revision of curriculum and accreditation processes the Office of Curricular Support (OCS) functions as the “clearinghouse” to track, monitor and ensure implementation of all new academic programs, initiatives, new courses and changes to current curricular offerings. With a direct report to the Provost, the OCS is charged with oversight and management of the processes for implementing new academic initiatives, programs and courses at Azusa Pacific University. The office serves to provide services to academic schools, colleges and departments to support the effective implementation, revisions and updates of initiatives and curriculum to ensure that APU meets or exceeds the standards for accreditation. The office is committed to collaboration with other academic, co-curricular and operation departments to ensure that implementation of new initiatives and programs are coordinated and consistently communicated to the APU community.

Activities of the OCS include:

- Ensure schools/colleges/departments maintain the highest standards for the design, delivery, and evaluation of new initiatives, programs, courses and changes to the current curriculum.
- Maintain a centralized curriculum management system to facilitate curriculum management, educational effectiveness, and implementation of new initiatives, programs and courses.
- Maintain a centralized catalog management system to ensure an up-to-date, accurate and integrated system for communicating and delivering the APU undergraduate and graduate catalogs.
- Provide administrative support to the Academic Cabinet, the Undergraduate Studies, Masters Studies, Doctoral Studies and General Studies Councils for review and approval of new and revised initiatives, programs and courses.
- Report regularly to academic, co-curricular and operation constituents on campus and to accrediting agencies (as appropriate) the status of initiatives, programs, and courses.
- Oversee all accreditation processes for APU to the Western Association of Schools and Colleges (WASC).
- Maintain all accreditation records and serve as a resource for all schools/colleges/departments undergoing accreditation processes.

Form A describes the provost’s curricular review and approval processes that are followed by OCS. Forms B-L represent the documentation used in the approval process. These forms are located on the OCS webpage.

## Co-Curricular and External Relations

### The Role of Student Life

The Student Life team exists for the transformation of students through discipleship and scholarship to change the world for Christ. Student Life personnel and programs create environments and experiences that assist students to develop a commitment to lifelong learning in the areas of community life, diversity, internationalization, spiritual life, and wellness. The Office of Student Life follows an annual strategic planning cycle that links our outcomes and goals to the larger university plan (see attachment). Specific to resource capabilities planning, Student Life determines resource capacities and allocations in the spring of each calendar year, finalizing these at the department level in May. Specific areas of revenue include Housing, Student Activities, Health and Parking revenues, whereas primary costs are salaries, benefits, and operations.

## Operations

### The Role of The Administrative Cabinet (TAC)

The cabinet assists the university in making timely, informed, and involved decisions while being supportive of the mission, purpose, and strategic priorities of the university. This includes, but is not be limited to the following:

- Review and make recommendations to Operations Committee on all new non-academic initiatives. Review new academic initiatives that impact operational unit budgets.
- Prepare the annual operating budget that is recommended to the President for approval.
- Space management strategy and operational plan that can be shared and coordinated with all constituents that meet the current needs of the university. This will include prioritizing medium and long term space needs.
- Review and approve changes to the employee handbook that are non-fiscal and policy related.
- Implement decisions made at the administrative cabinet level.
- Provide feedback to the Office of the President regarding operational impact and communication considerations for pending or probable mission-critical decisions.
- Assist the university with recommendations that impact the overall community.
- Support the university's commitment to communication by informing staff within participants' span of care throughout the organization.
- Identify issues that need to be resolved that have a global impact on the university and make recommendations that advance the university's mission or promote its business objectives and move them forward to the Office of the President.

TAC members function not as representatives of specific interest groups, but as a team committed to the successful future of the university in its infrastructure and business processes. The cabinet is chaired by the CFO. The chair calls meetings and manages the process and impact of the cabinet. Decisions and recommendations outside the cabinet's responsibility are made to the Office of the President for approval prior to implementation and communication.

### Budgeting Processes

Each year APU is faced with the challenge of creating a balanced budget. This balancing activity has tended to focus on an accounting balancing of the budget without necessarily focusing on whether the budget is balanced from a strategic perspective. The distinction, which is critical to the long-term

success of APU, relates to the types of annual investments and reinvestments required by APU to meet our mission. The operating budget is a communication tool supporting the strategic plan, a resource-specific expression of that plan, and an accountability metric for the acquisition and deployment of resources, and evaluation of the financial aspects of the plan's goals with those goals corresponding risks.

The university goals stated in the strategic plan are the starting point for creating the operating budget. Each new initiative specifies its goals, resources (financial, capital, human, information, etc). Without clearly defined goals, resources and performance measures, the new initiatives are not implemented. In October/November the Budget Office initiates production of the next fiscal year annual budget. The chief financial officer (CFO) meets with relevant stakeholders as needed to develop budget projections (see Form B: Budget Template). In addition, the CFO participates in Academic Cabinet and TAC meetings in which new initiatives/proposals are being shared in order to begin the process of incorporating these new initiatives into future budgets.

### **The Role of the Business Office**

The APU Business Office is committed to supporting APU's mission by providing the university community with consistently outstanding service, fiscal accountability, timely and accurate reporting, honest and ethical business practices, positive relationships with vendors and creditors, and sound financial policies that promote long-term stability and effective stewardship of the university's assets. The business office is responsible for ensuring all facets of business affairs of the university meet federal, state, and local guidelines and regulations.

The Business Office serves as a resource for strategic planning by providing accurate and timely financial information to administration to make informed decisions.

### **The Role of Human Resources**

The Department of Human Resources plays a key role at Azusa Pacific University, leading in the recruitment and mobilization of the university's workforce. The department's success is ultimately determined by how well it serves in helping the university achieve its mission and vision. In order to effectively fulfill this role over time, Human Resources must remain flexible - able to change as the university and its priorities change.

### **The Role of Information and Media Technology (IMT)**

Information and Media Technology's (IMT) purpose is to provide value to the University through stable infrastructure and new services. IMT works to create a technology environment and support infrastructure that supports the university's vision through partnerships with stakeholders. New initiatives/programs that utilize information technology resources must complete and submit an IMT Project Request Form (Form D).

### **The Role of Legal and Community Relations**

Community Relations advances the university's strategic position in the city; deepens and extends our ties to community neighbors, key influences, and elected officials; and identifies alliances and partnerships opportunities to build trust and shared values. General Counsel provides reliable legal advice and support to the APU community in a timely, user-friendly, and ethical manner. The Office of the General Counsel attempts resolve disputes before they create ill will or turn into litigation; however,

the Office defends the University vigorously if the occasion arises. The Office strives to collaborate with others who support the ability of Christian organizations to operate their institutions on the basis of biblical principles and hire employees who are faithful disciples of Jesus Christ.

### **The Role of the Operations Committee**

The primary role of operations committee (OPS) is to support the university's operations by providing resources from the contingency funds for non-budgeted operating funds requested in the current fiscal year. This is a decision-making committee that meets monthly. Academic requests are submitted to OPS from the Office of Curricular Support after approval by the Academic Cabinet. The entire Program or Initiative (PIP) form (Form F) is submitted to OPS. In addition if personnel positions are being requested, an Operations Request Form (Form C) is also submitted. Non-academic requests are submitted to OPS from the TAC for approval.

Non-planned and urgent financial decisions are made with the following four guidelines in their decision-making processes:

- New initiatives/programs should generally demonstrate a three year revenue neutral budget utilizing a 40% indirect cost rate.
- New initiatives/programs must demonstrate congruence with mission, values and be student centric as a first filter for the initiative to be considered.
- A new initiative/program must be recommended by Academic Cabinet for academic programs.
- The Office of the President is the final approval for Operations Committee decisions over a threshold of \$50,000.

### **The Role of University Advancement**

University Advancement is comprised of Development, Alumni Relations and University Relations. The role of the departments is to represent APU to external constituencies and to communicate the mission and competencies of the university for the purposes of engagement.

#### **The Role of Development (Fund Raising)**

Development is responsible for fund raising. This department represents APU to people of wealth and affinity, and develops and implements strategies for prospect and donor engagement and loyalty. Development fund raising goals include the Annual Fund, Major Gifts, and Endowment. Engagement strategies include estate planning, direct mail, phonathon, the Student Discovery Initiative, foundation and corporate relations (including corporate match), and work with individual major donors, and events (such as Dinner Rally). Development is the only department on campus that should tax receipt donations. This department manages the Raiser's Edge database (updating contact information at least four times/year), and will provide mailing lists for departments.

Development is also the architect of the capital campaign. As each unit and department in the university engages in the three year planning cycle, there are three ways to expand programs and effectiveness: (1) APU Budget, (2) APU Budget funded start up (seed) money, grant money, or (3) from philanthropic investment.

## **The Role of Alumni & Parent Relations**

The Office of Alumni & Parent Relations exists primarily to connect and reconnect alumni and parents of current students with the university through excellent events, programming, networking, marketing and communications. Various mediums are used to reach this audience, such as monthly e-newsletters, APU Life magazine, Facebook pages and various mailings. By continually building the alumni and parent base the department provides on-going connections for university advancement. The alumni & parent relations team work directly with the Executive Vice President to align programming such as Night of Champions, Homecoming activities, Grandparents Day, etc. with the long term strategic goals of the Office of the President. The Executive Director serves on the Parents Council that provides direct connection with parent leadership back to the university.

Feedback from alumni and parents was a vital part of the process in the development of the Shared Vision 2022. Thus parents and alumni participate in the strategic planning process to ensure the university remains true to its mission and sets a vision that will be supported and sustained over time by all.

## **The Role of University Relations**

University Relations exists primarily to create and execute marketing strategies and tactics, with a consistent university identity; increase market share so that we support enrollment growth; provide strategic communication counsel and conduct market research to gather feedback and analyze processes.

## **The Role of University Services**

University Services comprised of Auxiliary Services, Hospitality Services, and Facility Management/Construction provides operational support for university departments, programs, and functions. These three units provide goods and services that assist academic and departmental goals to be achieved. Supporting the university's building infrastructure, Facility Management/Construction consults with departmental administration to strategically plan for unit/departmental expansion or reconfiguration.

## **Integration of Strategic Planning and the Annual Planning Process**

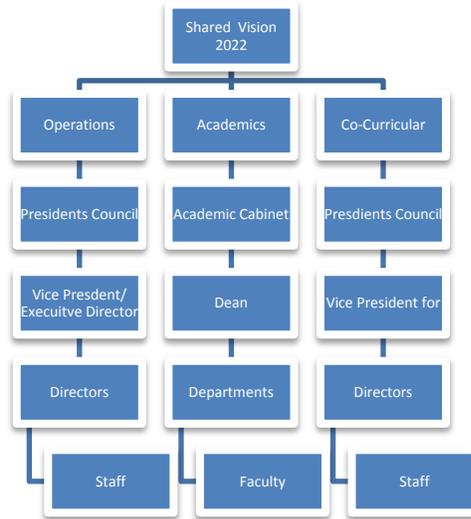
### **The Annual Planning Cycle**

The Annual Planning Cycle is a scheduled sequence of planning for all areas of the university that occurs each year between May-September (Appendix 1 and 2). As previously noted above, the strategic plans of all areas coalesce around the APU Shared Vision 2022 and the strategic plans created by the members of the President's Council and their direct reports. APU's planning cycle is directly linked to the fiscal planning process, so that plans are developed in time to be considered in the budget planning process for the following year; this is one reason that 3-year plans are necessary, so that the plans may be connected to fiscal planning.

Each department or division of the university meets in May – June of each year to report, revise and extend the 3-year plan for their area. The process is not complex and it is facilitated by the process explanations in this Handbook and supporting documents and templates. Annual plans are approved by the member of the President's Council who oversees their area to ensure that they align well with the

strategic plans in the larger domain. Members of the President’s Council integrate all the plans in their areas into a single, unified plan that is presented at the President’s Council retreat in August (Figure 3).

Figure 3



The approval and integration of these plans, provides a single cohesive and coordinated annual plan for the university, in addition to describing a new third year of the 3-year strategic planning. The iterative nature of the planning process allows the centralized plan to inform future plans by the divisions, as well as reciprocal influence from the divisions to influence the centralized plan.

#### Planning Deadlines

May – June: departments or divisions create, report, revise, extend plan  
 July – August: members of the president’s council integrate departmental/divisional plans  
 August: President’s Council retreat coordinates plans to create a centralized plan  
 September: operational groups review services and support plans for approved centralized plan  
 October – January: fiscal allocation process/budget process

Figure 4 depicts the elements that contribute to the development of the initial 3-year plan and the Report-Revise-Extend process that is conducted each year to refresh the plan and keep it aligned with current needs. This process is in contrast to static strategic plans that are created once every five or ten years and quickly become stagnant and meaningless to the actual decision-making process of the university. As noted by LaPiana (2008, *The nonprofit strategy revolution*, p. xiv), “... the flaw in the current state of the art: traditional strategic plans, once complete, are not fluid and organic but static – and they quickly grow stale... Today you need faster – indeed continuous – processes for responding to your environment.”

Figure 4



### Developing the Initial 3-Year Plan

The three year process begins by creating an initial three-year plan (Figure 5), to include a variety of existing and novel material:

1. **Current Events and Plans:** existing goals that have been established by prior strategic planning or team effort to determine goals are discussed and reviewed. This becomes the foundation of your 3-year plan.
2. **Incorporate Recommendations:** if a department/program participated in the program review process that yielded strategic recommendations, these are now incorporated as goals in the departmental strategic plan.
3. **External Standards:** if a program was impacted by accreditation expectations, legal requirements, or regulatory standards that must be implemented, these may become goals in the departmental strategic plan.
4. **New Programs or Initiatives:** if a school/department anticipates proposing a new program or initiative, the development and submission of the proposal may become a goal in the strategic plan. Some proposals may include a start-up budget that requires funding (and thus must be approved by the Operations Committee), but the extended budget demonstrates that the program or initiative will eventually become self-supporting (and thus after the first year is incorporated by the Budget committee into the university budget). Other proposals may rely on gift or grant funding and will operate outside the normal budget of the university.

Figure 5



Strategic planning documents exist to assist in the planning process (Appendixes 3-5). Appendix 4 Strategic Priorities and Objectives References provides an overview of the Shared Vision 2022, the Academic Vision 2022 and a variety of other strategic priority documents from which annual plans are

developed and “mapped” to in order to ensure congruence between annual plans and the strategic priorities of the university. In addition academic and co-curricular areas are invited to “map” annual goals to findings from components of the Program Review process where applicable.

Annual Plans are collated, tracked and analyzed in TaskStream. Appendix 3 provides the instructions and glossary of terms for the annual goal reports. Task Stream accounts exist for all schools/departments/administrators to maintain records of the annual strategic plan and to report revisions to the plan. Departments are responsible for maintaining their own records, reporting and updating documents each May-June. Appendix 5 is a WORD document example of the annual strategic planning template information that is entered into TaskStream. The template establishes the university context for the department or program strategic planning. It includes the university mission statement, the APU Shared Vision 2022 and the four strategic priorities of that vision, the Academic Strategic Priorities (for reference by academic programs and administrators), the Program Review Components (for reference by academic and co-curricular areas that complete program review), and a planning table that allows the department to list goals and link them to the University Strategic Priorities, as well as the Academic Priorities or Program Review Components (depending on the nature of the goal and the department or program creating the goals). The template also provides the opportunity to identify the assessment method for determination of goal achievement, acceptable and ideal targets for each goal and an implementation plan for progress toward each goal.

With all strategic plans are entered into TaskStream, the university is able to synthesize the plans into an overarching, cumulative centralized plan that incorporates all plans according to their linkage to specific Shared Vision Strategic Priorities, and/or Academic Strategic Priorities, and/or Program Review Components. An analysis of university-wide planning themes facilitates the report-revise-extend process at the end of each year (see below).

### **Revisions of the Plan at the End of Year One**

At the end of the year, each area meets to review the 3-year plan created one year earlier and to report on accomplishments, revise existing goals, and extend the plan to include new goals:

1. Report: note and celebrate the accomplishment of goals. Indicate on the Strategic Planning template the achievement of the acceptable or ideal target and the substantiating evidence of that accomplishment.
2. Revise: some goals may need to be revised to address new circumstances or changes that have occurred during the last year. This is an opportunity to adjust those goals, noting the revision on the Strategic Planning template. For example, if changes in accreditation or law render some planned goal obsolete, the plan is revised accordingly. Or, a new program review may have generated recommendations that need to be incorporated into the goals.
3. Extend: a key element of the Strategic Planning process at APU is the iterative nature of the plan and the opportunity to add new or emerging goals to the plan as APU ends one year and begins a new 3-year cycle. New primary goals may be added to the plan or new sub-goals may be added to extend the existing sub-goals under any primary goal. For example, the primary goal to generate a new program proposal might be added to the plan if a department intends to present it during the next three years. Alternatively, it may have determined that there is an entirely new element needed for an existing goal, so a new sub-goal is added to extend that plan.
4. New 3-Year Plan (Figure 6): the result of the report, revise, and extend process is a new 3-year plan that begins as soon as you complete the annual process.

Figure 6



Ultimately, the plans generated in the annual planning process must link to the fiscal allocation process. Annual plans inform the fall budget process (budget is approved by the President and the Board of Trustees). Plans that require new expenditures beyond the current budget (positions, buildings, or budget allocations) are reviewed, and if approved, resources are allocated by the Operations Committee. In the budget planning process, plans that require new funding for personnel, space, or other resources will be evaluated in light of the four university strategic priorities:

- Mission: does the plan contribute to the mission of the university?
- Academic Reputation: does the plan further the academic reputation of the university?
- Valuing People: does the plan meet expressed needs of students and engage faculty and staff in effective and efficient systems?
- Financial Excellence: does the plan promote financial excellence through an appropriate return on investment that strengthens the financial standing of the university?

As previously discussed, budget decisions regarding new initiatives/programs are made with the following four points considered during the decision-making processes:

- New initiatives/programs should generally demonstrate a three year revenue neutral budget utilizing a 40% indirect cost rate.
- New initiatives/programs must demonstrate congruence with mission, values and be student centric as a first filter for the initiative to be considered.
- The new initiative/program must be recommended by Academic Cabinet for academic programs and The Administrative Cabinet for non-academic initiatives.
- The Office of the President is the final approving body.

### Planning Processes for Academics

The centrality of the academic mission and the length of time required to develop and implement new academic programs and initiatives requires a more elaborate process for academic planning. There are two sources for origin of new academic programs and initiatives: university-wide initiatives coming from the Office of the Provost and academic program initiatives coming from the departments of the schools and colleges.

Form A: Office of the Provost Curricular Review and Approval Process provides a step-by-step description of the process to bring the “idea” of a new program or initiative into “reality”. In Stage 1, the Schools/Colleges Initial Proposal (SCIP) for a New Program or Initiative (see Form E) presents the basic logic for the program and supplies introductory evidence to support why the new program is needed. This form is developed by a faculty member, chair or dean and is presented by the dean to the Academic Cabinet in extended session three times a year (October, February, and April) in accordance with the Academic Strategic Planning Cycle (Appendix 2). The form is first submitted to the Office of Curricular Support (OCS) who reviews the document to ensure it is complete and then begin the process of

tracking the document through the implementation process. The OCS submits all forms to the provost office to place them on the calendar for an upcoming extended meeting of the Academic Cabinet.

An adequate preliminary proposal provides sufficient information upon which to base a decision to proceed or not to proceed with further consideration. The SCIP addresses the following issues:

- Brief description of the degree, curriculum, and delivery mode, with timeline for planning and implementation
- Mission congruence – university, school, and department
- Initial evidence that suggests an external demand for the program (this may include national, local, or discipline demands and trends, but is not expected to be a full feasibility study at this point)
- Institutional capacity to deliver and support the program
- Resources required to develop and support the program, along with initial estimate that the new program will be revenue positive, neutral, or negative in the first three years.

After the Academic Cabinet has indicated its support for the proposed program in principle, Stage 2 is initiated and the department chair works with the OCS and faculty to design the program and complete the Program or Initiative Proposal (PIP) (Form F) and preliminary discussions to review the components of the educational effectiveness (EE) process (see Forms G-K). The PIP which may take 12 to 18 months includes: (1) developing the curricula, (2) crafting any necessary documents for accreditation, (3) conducting a comparison of curricula, time to degree completion, and tuition to appropriate competitors, (4) outlining a three-year budget, and (5) conducting a market analysis or feasibility study to verify the demand for the program. Concurrently departments are encouraged to complete the educational effectiveness (EE) process and related paperwork for the program. This critical part of the proposal provides more specific information about the curricular plan, including a curricular map, an assessment plan, faculty needs and qualifications, and three sample syllabi.

The PIP is submitted to OCS and is placed on the agenda for the Academic Cabinet to review and approve. Once approved, Stage 3, the Educational Effectiveness (EE) process can be initiated. This stage involves a high degree of faculty involvement to develop the curricula, student outcomes, and assessment plans. Forms G-K represent the different paperwork that needs to be completed based upon the need for a new program, new course, changes to current courses or other minor expedited curricular changes. Once this documentation has been completed by the department it is submitted to OCS. OCS is responsible for getting the proposal on the agenda of the Curriculum Committee of the Undergraduate, Masters or Doctoral Studies Council for review and approval. Once approved by the curriculum committee the proposal moves to the UG, Masters or Doctoral Studies Council for approval. This approval is noted in the Council minutes. By consensus ballot, the Senate reviews all council minutes and approves or disapproves the action of the Council in regards to the curricular change. The OCS is responsible for tracking the proposed change along this journey and once approved by Senate, the OCS is responsible for ensuring information about the new course or minor course change is disseminated to the Registrar's office, those responsible for catalog changes, University Relations, and other parties impacted by this change. The OCS is responsible for tracking the new proposal until one month following actual implementation.

### **Initiatives for New Courses or Changes to Current Curricular Offerings**

Development of new courses and minor course changes is initiated by faculty within their respective department. Each department has its own governance structure and processes for reviewing and approving new courses or minor course changes. Once these changes have been approved by a

department committee, the chair and the dean, the proposal is submitted to the Office of Curricular Support (OCS) for review and tracking through the approval office. OCS is responsible for getting the proposal on the agenda of the Curriculum Committee of the Undergraduate, Masters or Doctoral Studies Council for review and approval. Once approved by the curriculum committee the proposal moves to the UG, Masters or Doctoral Studies Council for approval. This approval is noted in the Council minutes. By consensus ballot, the Senate reviews all Council minutes and approves or disapproves the action of the Council in regards to the curricular change. The OCS is responsible for tracking the proposed change along this journey and once approved by Senate, the OCS is responsible for ensuring information about the new course or minor course change is disseminated to the Registrar's office, those responsible for catalog changes, University Relations, and other parties impacted by this change (see Form A, Stage 4). The OCS is responsible for tracking the new proposal until one month following actual implementation.

## **Strategic Planning and the Comprehensive Campaign**

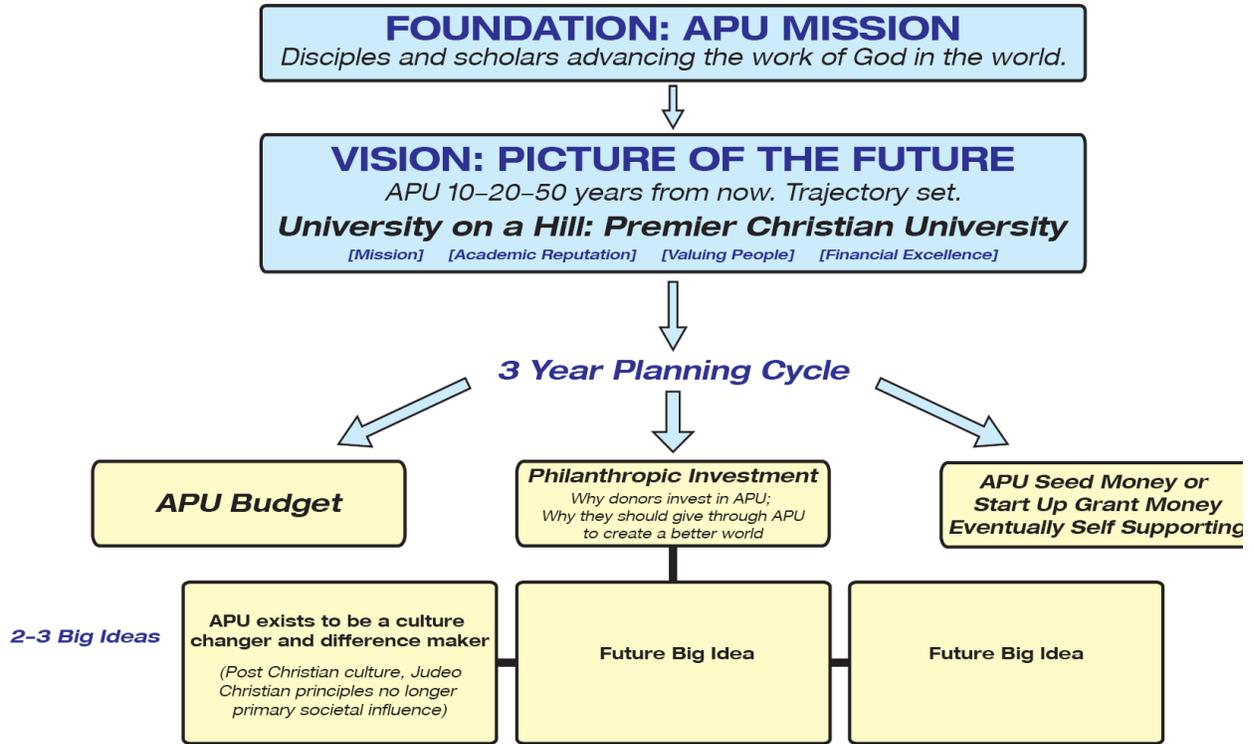
APU's Shared Vision 2022 paints a picture of the APU of the future, highlighting the purpose of the university in the world. The university aspires to be a premiere Christian university because of a deep sense of the needs of the world, an awareness that is both specific and global: specifically, the human condition and its attendant brokenness, and globally, the challenges our world faces. As a premiere Christian university, APU seeks to address the pressing questions of life, both on the individual level as we shape disciples and scholars, and on the global level through our research and outreach programs.

APU's identity, mission, and values are clear. Our ability to define what the university of ten years from now looks like will determine the trajectory of the comprehensive capital campaign. Such a campaign will be able to finance the dreams and vision for APU that can most effectively address and what work will be done to address those issues. The comprehensive capital campaign will then be structured to galvanize the necessary philanthropic investment to achieve those goals (Figure 7).

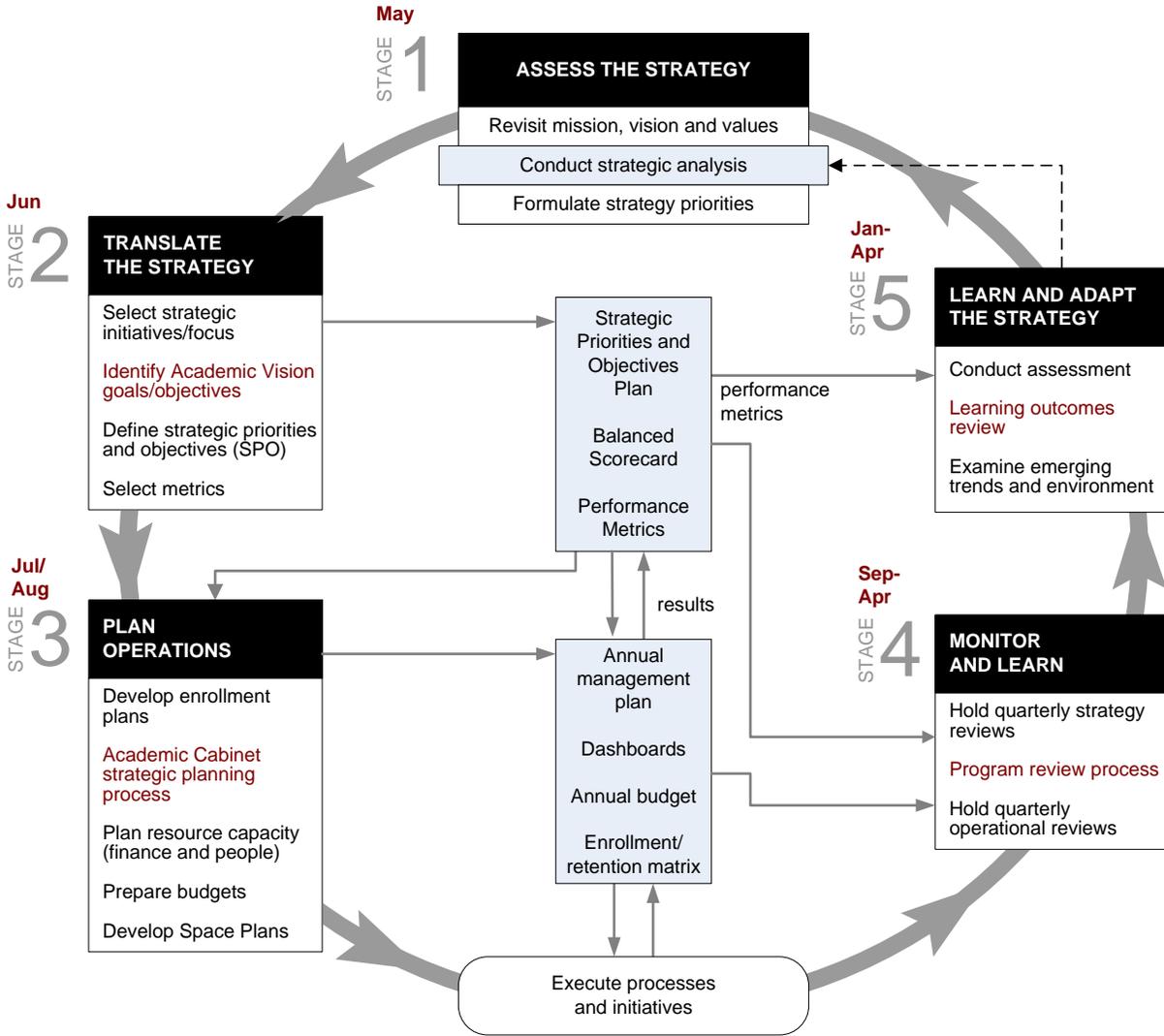
The process for determining the priorities and strategies for the capital campaign are as follows: First, the President's Council invites all APU stakeholders to craft three year goals for the leader's span of care that is in keeping with the Shared Vision 2022 and consistent with the mission and identity. The plan to achieve the goal should be outlined, with defined methodology, timeline and budget for accomplishing the goal and metrics to measure progress and success. University Advancement will assess the feasibility/potential of the plan for philanthropic support. Constituency interest will be considered, as the passions of the prospective donors are important to align with the purposes and methods. University Advancement will also assess the capacity for support, and the most likely types of gifts. For example, a donor may wish to leave his/her estate to APU, which may be sizable but deferred, and therefore would be more suited towards endowment and would not be of help with a capital construction project.

As the information is gathered, University Advancement will advise the Office of the President as to feasibility and capacity. Then the Office of the President will weigh the proposed projects with the expected ability to fund raise, and make a recommendation to the Board of Trustees. Ultimately the Board of Trustees votes to enter into a defined campaign.

Figure 7

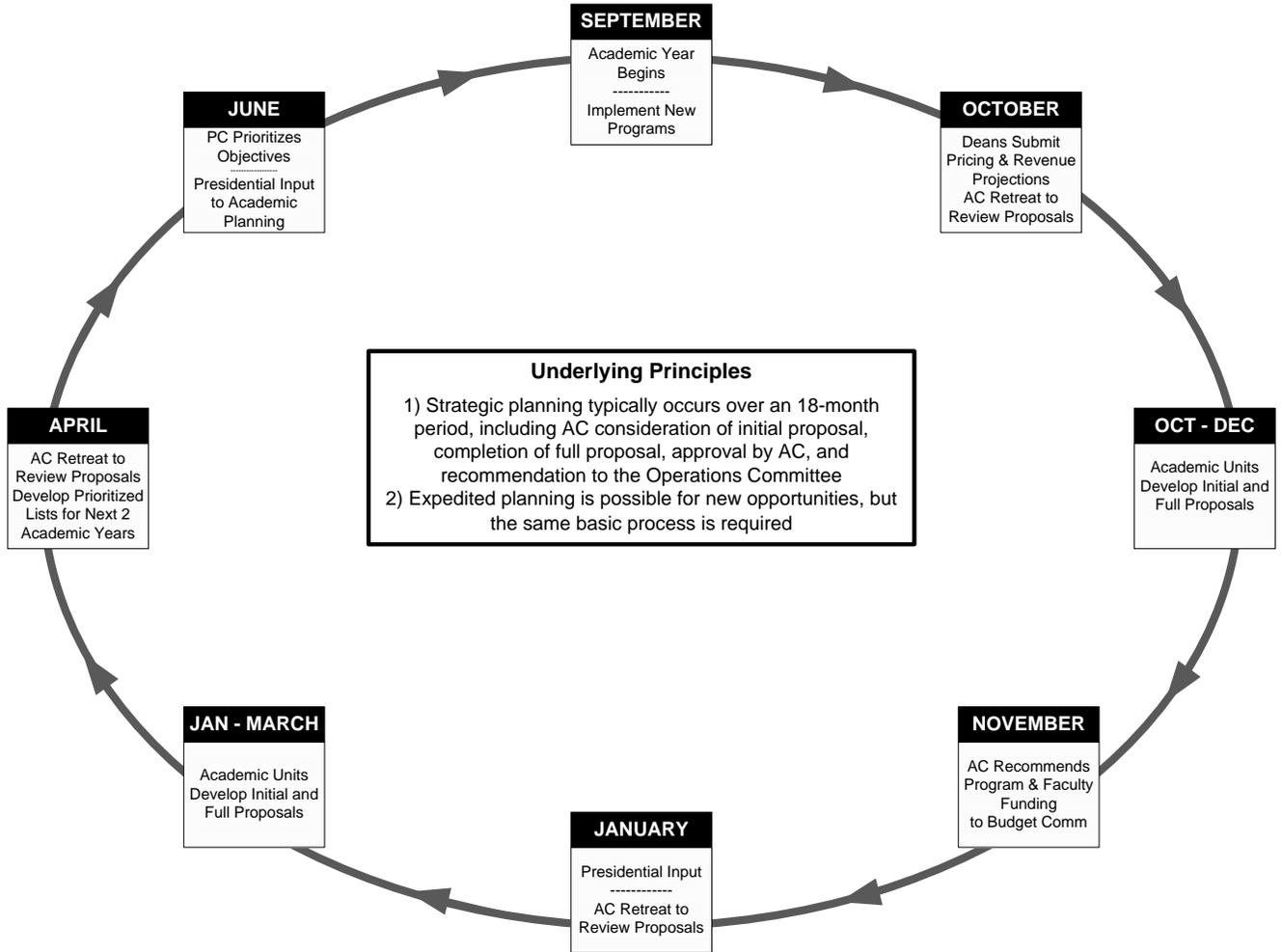


Appendix 1 Annual Planning Cycle



## Appendix 2

### Academic Strategic Planning Cycle



## Appendix 3



# Annual Strategic Plan Goals and Action Plan

*School/ College/Department Name here*

## Instructions:

The strategic planning documents consist of the following:

- Annual Strategic Plan Instructions
  - The instructions for how to complete the Annual Strategic Plan Templates.
- Strategic Priorities and Objectives References
  - A summary of the Shared Vision 2022 Strategic priorities and other essential strategic priorities appropriate to academics, co-curricular or operations that you will map, or cross reference your department/programs goals to in order to demonstrate how they are meeting university priorities
- Annual Strategic Plan Template
  - Three tables you will complete with your department/program annual plans. Completed tables are to be submitted to [annualplans@apu.edu](mailto:annualplans@apu.edu). Once completed these tables will be uploaded into a TaskStream account created for you by CTLA and the Office of Curricular Support. Once this account has been formed and all the data you submitted has been uploaded you will be responsible for annually updating and maintaining this account.

## Creating Department/Program Goals:

Goals are created to support institutional capacity to ensure programs have the administrative structures, processes, and/or resources (people, money, time, facilities, equipment, etc.) needed, or desired, to achieve their student learning outcomes. Program Goals are not learning outcomes, but objectives that speak to the elements that support the learning outcomes.

Write as many goals as needed, but be selective; it is impossible to do or have everything.

As departments develop and write their program goals, they should make certain each goal:

- Identifies a specific operational or functional intent, something the department or program wants to have, do, or achieve. It is acceptable to establish program goals for a department as a whole, for the department's specific programs, or a combination of both. Similarly, departments might include goals related to student enrollments, completion rates, etc. goals that speak to student issues but are not learning- or faith-integration outcomes.
- Is achievable at an acceptable level, given available time and resources. Ask the simple question: Is the goal implying, requiring, or expecting something outside the department or program's ability to accomplish, acquire, or actually deliver? APU does not possess unlimited resources. Avoid creating unrealistic expectations for the department, program, or personnel.
- Utilizes language that clearly identifies when, how, or if the goal is achieved.

It is common for departments to prioritize their program goals in some manner. While a department is free to select any prioritization method it wishes, the simplest method is to list the goals in the order the department wants them achieved.

PROGRAM GOAL SAMPLES

- *Increase the Bachelor of Social Work majors to 120.*
- *Develop a system of tracking our departmental alumni/ae in their post-graduate careers.*
- *Establish a rate of full-time faculty hires that will move our adjunct to faculty ratio below 50/50 percent.*
- *Develop a 400-level biblical studies seminar on biblical Ethics.*
- *Add a class that identified historical and philosophical perspectives on racism, sexism, and ethnocentrism in accordance with departmental program review.*
- *Create a process for students to conduct research with faculty members in the department.*

Below is a description of the components of the Annual Strategic Plan Template

**TABLE 1 - PROGRAM/DEPARTMENT GOALS**  
**SCHOOL/COLLEGE/PROGRAM/DEPARTMENT MISSION STATEMENT**

<p><i>Place your school/college/department mission statement here. If you already have a mission statement entered within TaskStream, it will automatically appear within this area. If you do not have one you can enter one here</i></p>
<p><i>Max 60 characters. State a specific program/department overall goal. One goal per box. This set of “goal boxes” will be repeatable allowing entry of numerous goals.</i></p>
<p><i>Optional. Max 1000 characters. Elaboration of goal as needed to explain concept.</i></p>
<p><i>All departments/programs map each outcome to relevant university strategic priorities. See document: Strategic Priorities and Objectives References. Additionally all academic programs map to the relevant academic priorities and academic program review components. All co-curricular programs map to the relevant co-curricular priorities and co-curricular program review components. Other departments (e.g. IMT) map to strategic priorities identified by that department as applicable.</i></p> <p><i>When documenting mapping info on the goals chart—refer to the corresponding strategic initiative by using numbers only (e.g. 1.1, AV7, etc). Do not write out the entire strategic priority.</i></p>

**TABLE 2 - OPERATIONAL PLAN**

Completing this part of the operational plan is a two-step process. First select a program/department goal. Next create actions to achieve that goal. You may create multiple actions per goal. Use one table for each goal and its related action steps.

**ACTION ITEM TITLE**

For goals that can be allocated into action items, enter each action item title (or sub-goal) and associated elements below. For each sub-goal you may add supporting attachments and links in the next step.

<i>Brief title for each action item.</i>
<i>Enter action steps for each outcome. One action per box. This set of "action boxes" will be repeatable allowing entry of numerous action steps.</i>
<i>Month and year</i>
<i>List person(s) that will be responsible for completing this action.</i>
<i>List indicators of success.</i>
<i>List resources needed to complete action.</i>
<i>If a budget has been assigned to this action item, list amount requested.</i>
<i>Provide attachments or weblinks as needed that may include detailed budget, space request forms, IMT process forms, etc.</i>

**COLLABORATION EFFORT****STATUS REPORT**

<i>List person(s) or departments that will be collaborating with your department to achieve the action item (e.g. IMT)</i>
--

Status reports are to be completed May-June of each annual cycle. Enter information for each goal and associated sub-goals identified in the operational plan.

This table not required at this time, however if some departments have goals they have been working on in 2011-2012 that will extent for the next 2-3 years they may choose to Report/Revise and Extend them at this time

**CURRENT STATUS (CHECK ONE)**

<ol style="list-style-type: none"> <li>1. <i>Not started</i></li> <li>2. <i>In progress</i></li> <li>3. <i>Completed</i></li> <li>4. <i>Not Implemented</i></li> </ol>	<ol style="list-style-type: none"> <li>1. <i>Approved</i></li> <li>2. <i>Pending approval</i></li> <li>3. <i>Not approved</i></li> <li>4. <i>Other</i></li> </ol>
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**SUBSTANTIATING EVIDENCE**

*Provide attachments as needed that would indicate how action has been achieved.*

*REPORT: enter summary of report on achievement of action item*

**SUMMARY OF NEXT STEPS**

*REVISE & EXTEND: If the action is not completed, describe how it will be revised and/or extended.*

*Date action was completed.*



## Appendix 4

# University Strategic Priorities and Objectives References

## UNIVERSITY MISSION STATEMENT

*Azusa Pacific University is an evangelical Christian community of disciples and scholars who seek to advance the work of God in the world through academic excellence in liberal arts and professional programs of higher education that encourage students to develop a Christian perspective of truth and life.*

## APU SHARED VISION 2022

*APU will be a premier Christian university and a recognized leader in higher education, a city on a hill that reflects the life of Christ and shines the light of Truth.*

## UNIVERSITY STRATEGIC PRIORITIES

MISSION	ACADEMIC REPUTATION	VALUING PEOPLE	FINANCIAL EXCELLENCE
<p><i>We will nourish and advance our Christ-centered mission.</i></p> <p>1.1 We will submit to the Lordship of Christ and the authority of Scripture while wrestling with controversial ideas, difficult issues, and vexing questions.</p> <p>1.2 The university community will support, sustain, and affirm the APU identity, values, and ethos.</p> <p>1.3 Every student will be taught from an evangelical Christian worldview, developing their mind and shaping their character.</p> <p>1.4 We will continue to partner with and serve the Church in the redemptive work of God in the world.</p> <p>1.5 We will aspire to develop disciples and scholars with intellectual and moral virtue, who are active locally, nationally, and globally, making a transformational impact on culture and society.</p>	<p><i>We will have an academic reputation of excellence.</i></p> <p>2.1 We will be experts in faith integration, across every program and discipline.</p> <p>2.2 We will affirm, celebrate, and reward strong and effective teaching and instruction while we continue to build a culture of scholarship.</p> <p>2.3 We will actively engage the world in exploring God's Truth through research and scholarship.</p> <p>2.4 We will advance God-honoring diversity and internationalization in teaching and scholarship.</p> <p>2.5 We will be a preferred destination for gifted faculty and students.</p>	<p><i>We will acknowledge that people (student, faculty, and staff) are created in the image of God and value them as the university's most important resource.</i></p> <p>3.1 We will develop and maintain the highest standard of student (customer) service so that we are "student centered."</p> <p>3.2 We will be an outstanding workplace and a preferred destination for employment, attracting, retaining, and developing an intergenerational and diverse world-class faculty, staff, and board, distinguished by their engagement with the APU mission.</p> <p>3.3 We will implement intentional development of people at all levels of the university, building capacity for excellence, both now and in the future.</p> <p>3.4 We will develop effective and efficient systems, promoting a mission- focused community.</p>	<p><i>We will be a financially strong institution capable of fulfilling our mission.</i></p> <p>4.1 We will develop innovative models for accessibility and affordability, supporting growth and financial stability.</p> <p>4.2 We will maintain an appropriate and resilient capital structure with a strong balance sheet.</p> <p>4.3 We will accomplish a comprehensive campaign to support and advance our vision and mission.</p> <p>4.4 We will advance APU through responsible, comprehensive enrollment strategies, matching relevant academic programs with diverse student populations.</p>



## Annual Strategic Plan Academic Strategic Priorities and Objectives

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### Raise APU's Academic Reputation as a High-Quality, Comprehensive University

*Cultivate a culture of trust and collaboration in the pursuit of excellence*

1. Employ decision-making processes that are both **strategic and innovative**.  
*Actively consider new opportunities and goals through careful needs assessment and planning.*
2. Ensure **data-based information** is integrated into all decision-making processes.  
*Develop and utilize accurate data in the etiology and refinement of goals and initiatives.*
3. **Support faculty and student research.**  
*Create benchmarks for faculty and student scholarship and provide resources with accountability to achieve those goals.*
4. Ensure that a cogent **understanding of faith integration and spiritual formation** is integrated into all academic programs.  
*Establish clear definitions and expectations regarding fulfillment of our mission as a Christian university.*
5. Continue our commitment to **God-honoring Diversity** as evidenced by respect that values all individuals.  
*Affirm and sustain our Christian commitment that all people are created in the image of God in our academic endeavors.*
6. Cultivate **faculty expertise** as educator-mentors, scholar-practitioners, and servant-leaders.  
*Advance faculty developmental processes to support the central role of faculty in higher education.*
7. Engage in the **continuous improvement of student learning.**  
*Develop and employ resources and processes that facilitate student academic engagement and thriving.*
8. Ensure programs and processes are employed to promote **undergraduate excellence.**  
*Uphold our commitment to a liberal arts education with distinction.*
9. Enhance services and support that facilitate **distinction in graduate and adult education.**  
*Provide resources appropriate to the academic needs of adult and graduate students.*
10. Pursue **intentional internationalization.**  
*Provide significant opportunities for cross-cultural and cross-border academic experiences.*



## Annual Strategic Plan Academic Program Review Components

### Component A – Mission and Context

- A.1 – Program Mission and Purpose
- A.2 – Outcomes from Last Review

### Component B – Faculty Characteristics and Qualifications

- B.1 – Faculty Qualifications
- B.2 – Faculty Demographics
- B.3 – Faculty Accomplishments
- B.4 – Analysis of Faculty Qualifications
- B.5 – Full-Time Faculty Workload
- B.6 – Percentage of Courses Taught by Each Faculty Classification
- B.7 – Student Faculty Ratio
- B.8 – Summary of Teaching Effectiveness Data
- B.9 – Analysis of Teaching Effectiveness
- B.10 – Faculty Summary Analysis

### Component C – Student Enrollment and Success

- C.1 – Student Diversity
- C.2 – GPA Trend Analysis
- C.3 – Graduate Success Indicators
- C.4 – Student Fit with Program Mission
- C.5 – Student Organizations
- C.6 – Student Assistance
- C.7 – Student and Alumni Achievement
- C.8 – Diversity Analysis in Enrollment and Degrees Awarded to Full-Time Students
- C.9 – Recruitment and Enrollment
- C.10 – Evidence of Successful Completion
- C.11 – Retention and Student Success Analysis

### Component D – Academic Opportunities and Class Size

- D.1 – Special Study Options
- D.2 – Class Size Analysis
- D.3 – Non-credit Courses
- D.4 – Academic Opportunities and Class Size Analysis

### Component E – Curriculum and Student Learning

- E.1 – Curriculum Structure
- E.2 – Curriculum Map of Program Student Learning Outcomes
- E.3 – Analysis of Curriculum and Program Student Learning Outcomes
- E.4 – Assessment of Student Learning
- E.5 – Use of Continuous Assessment
- E.6 – Communication of Outcomes to Students

### Component F – Faith Integration

- F.1 – Support for Faith Integration
- F.2 – Evidence of Faith Integration

### Component G – Use of Student and Constituent Feedback

- G.1 – Student Feedback
- G.2 – Alumni Feedback
- G.3 – Employer/Supervisor Feedback
- G.4 – Constituent Feedback Analysis

### Component H – Resources and Institutional Capacities

- H.1 – Information Literacy and Library Resources
- H.2 – Resource Analysis
- H.3 – Budget and Enrollment Analysis
- H.4 – Use of Acquired Resources
- H.5 – Resource Allocation Relative to Capacity



## Division of Student Life

### Strategic Priorities and Student Learning Goals

**MISSION STATEMENT:** The Student Life team exists for the transformation of students through discipleship and scholarship to change the world for Christ.

Student Life Strategic Priority		Student Life Strategic Priority Descriptions	Corresponding University Strategic Priority	Student Life Student Learning Goals (SLG)	CAS Learning and Development Outcome
SL1	Christ	As disciples, we will endeavor to place Christ as central to the work of student development at APU. We will take seriously individual and corporate spiritual formation and will prioritize participation in a local community of faith.	Mission (1.1)	<b>SLG1:</b> Students will learn to articulate and live out personal and corporate faith in Christ that inspires transformational discipleship.	Intrapersonal development
SL2	Scholarship	As educators, we will contribute to a campus culture of scholarship by creating environments and experiences that engage faculty, staff and students in co-curricular learning.	Mission (1.3)	<b>SLG2:</b> Students will identify and integrate classroom learning with out-of-class experience.	Knowledge acquisition, construction, integration and application
SL3	Community	As members of the Body, we will model civility in our relationships with others. We will take the initiative to maintain an intentional community marked by open, honest communication, collaboration and compassion.	Mission (1.4)	<b>SLG3:</b> Students will engage in healthy interactions with others that enhance understanding and appreciation of personal and cultural differences.	Interpersonal competence
SL4	Service	As Kingdom citizens, we will value our neighbors and show genuine concern for and engagement with the "other" in the	Mission (1.5)	<b>SLG4:</b> Students will become aware of God's heart for all people, and will accept challenges to sensitively and strategically	Humanitarianism and

		context of an increasingly global society.		engage in local, national and global concerns.	civic engagement
<b>SL5</b>	<b>Diversity</b>	We will pursue intercultural competence and maturity by developing opportunities that challenge and encourage faculty, staff and students to interact with and respond to people and perspectives different from their own.	Academic Reputation (2.4)	<b>SLG5:</b> Students will be able to articulate, embrace and demonstrate God-honoring diversity and reconciliation as integral components of being a disciple of Christ.	Humanitarianism and civic engagement
<b>SL6</b>	<b>Leadership development</b>	We will assist students and staff in identifying and operating out of their personal strengths, and will provide intentional opportunities for professional development to enable fulfillment of educational and vocational goals.	Valuing People (3.2)	<b>SLG6:</b> Students will engage in ongoing purposeful exploration to recognize and embrace their calling, and will desire to use their vocation to advance the Kingdom of God.	Intrapersonal development
<b>SL7</b>	<b>Wellness</b>	We will positively impact productivity, satisfaction and persistence by investing in each individual's personal holistic well-being.	Valuing People (3.3)	<b>SLG7:</b> Students will actively participate in the process of identity formation and in the development of the whole self.	Practical competence
<b>SL8</b>	<b>Stewardship</b>	We will make resource and programmatic decisions that are mission driven and data informed. We will advocate for, create and maintain spaces on campus that promote a sense of Christian community.	Financial Excellence		



## Annual Strategic Plan Co-Curricular Program Review Components

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- Part 1: PROFILE
  - 1.1: Mission Statement
  - 1.2: Assessment
  - 1.3: Strategic Planning
- Part 2: OFFICE DEVELOPMENT
  - 2.1: Organization & Management
  - 2.2: Leadership
- Part 3: HUMAN RESOURCES
- Part 4: LEGAL & ETHICAL RESPONSIBILITIES
  - 4.1: Ethical
  - 4.2: Legal
- Part 5: EQUITY & DIVERSITY
  - 5.1: Equity
  - 5.2: Diversity
- Part 6: CAMPUS & COMMUNITY RELATIONS
- Part 7: RESOURCES
  - 7.1: Financial Resources
  - 7.2: Technology
  - 7.3: Facilities



## Annual Strategic Plan IMT Strategic Priorities and Objectives

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- |        |  |
|--------|--|
| IMT 1. | Foster simplicity and flexibility throughout the information environment.  |
| IMT 2. | Provide an enabling infrastructure that promotes information is used as a strategic service and resource.  |
| IMT 3. | Continual improvement of services that enriches the learning environment, both physical and distributed.   |
| IMT 4. | Enable our customers by facilitating change, leading to the identification of future service capabilities that support the university's mission. |
| IMT 5. | Promote professional development opportunities for IMT staff for both technical and behavioral skills.   |



# Annual Strategic Plan

*School/ College/Program/Department Name here*

## Goals

**School/College/Program/Department Mission Statement**

*Place your school/college/department mission statement here. If you already have a mission statement entered within TaskStream, it will automatically appear within this area. If you do not have one, you can enter one here.*

**Table 1- Program/Department Goals**

Goal		MAPPING					
Goals	Description of Goals (optional)	University Strategic Priorities	Academic Priorities	Academic Program Review	Co-Curricular Priorities	Co-Curricular Program Review	Other
1							
2							
3							
4							
5							
6							
7							



# Annual Strategic Plan

*School/ College/Program/Department Name here*

## Operational Plan

**Table 2 – Operational Plan**

(cut and paste as many of the tables below as needed to report on all goals listed in Table 1)

Goal # from Table 1: _____								
Action Item Title	Action Details	Target Achievement Date	Key Responsible Personnel	Criteria for Success	Description of Resources Required	Budget Requested Amount	Supporting Attachments	Collaboration Effort
Goal # from Table 1: _____								
Action Item Title	Action Details	Target Achievement Date	Key Responsible Personnel	Criteria for Success	Description of Resources Required	Budget Requested Amount	Supporting Attachments	Collaboration Effort



# Annual Strategic Plan

*School/ College/Program/Department Name here*  
**Action Statuses**

**Table 3 - Action Statuses**

(cut and paste as many of the tables below as needed to report on all goals listed in Table 1)

This table not required at this time, however if some departments have goals they have been working on in 2011-2012 that will extent for the next 2-3 years they may choose to Report/Revise and Extend them at this time

Action Item Title	REPORT								Substantiating Evidence	Status Summary	REVISE	EXTEND
	Current Status (Check One)				Budget Status (Check One)						Summary of Next Steps	Date of Completion (if applicable)
	Not Started	In Progress	Completed	Not Implemented	Approved	Pending Approval	Not Approved	Other				



## OFFICE OF THE PROVOST Curricular Review and Approval Process

Employing decision-making processes that are both **strategic and innovative** is identified as a key goal in the Academic Vision. To better support academic decision-making processes related to new programs, new initiatives, and revision of curriculum a new curricular review process has been developed.

The Office of Curricular Support (OCS) is charged with oversight and management of the processes for implementing new academic programs, initiatives, and courses at Azusa Pacific University. The office serves to provide services to academic schools, colleges and departments to support the effective implementation, revisions and updates of initiatives and curriculum to ensure that APU meets or exceeds the standards for accreditation. The office is committed to collaboration with other academic, co-curricular and operation departments to ensure that implementation of new programs and initiatives are coordinated and consistently communicated to the APU community.

The attached 4 stage process outlines the stages needed to implement new initiative and curricular changes at APU. Though the process is presented in a linear form, there may be variations from proposal to proposal in the sequencing of items within each stage.

### **STAGE 1 - School/College Initial Proposal (SCIP) Process**

In this initial stage, members of the Academic Cabinet (AC) share with each other their new program and initiative ideas. The AC determines if these suggested plans align with the Shared Vision 2022 and Academic Vision 2022 Goals. If the project appears to be a good fit, then the AC member is approved to move the project to Stage 2.

### **STAGE 2 - Program or Initiative Proposal (PIP) Process**

During this stage the AC member works with other key personnel in their school/department to develop the structural and resource components of the proposed new program or initiative. The focus is on describing fiscal, personnel, technology, library and space resources that will support and sustain the program/ initiative. The AC evaluates and approves the detailed proposal.

### **STAGE 3 - Educational Effectiveness (EE) Process**

In the Educational Effectiveness (EE) stage, department faculty develop the curriculum and complete departmental processes to approve the curriculum. The completed EE documents are submitted by OCS to the appropriate academic councils, and eventually the Senate, for approval of the program, course, or change to current course offerings. Development of the EE documents for Stage 3 may be initiated by the department concurrent or subsequent to the PIP approval (Stage 2). Doing so will help to expedite the time from original initiation of the proposal to approval by all Senate related councils. New Course and Change to Current Curricular Offerings begin at Stage 3.

### **STAGE 4 - Implementation and Notification Process**

Once the proposal has been approved by the Senate, the fourth stage is initiated to ensure all impacted departments at APU are notified of the curricular change. If this is a program that needs to be approved by WASC, this approval would be sought after the Senate has approved the program.

### **Contacts**

#### **Dr. Vicky Bowden**

Accreditation Liaison Officer  
Representative to Academic Cabinet  
626-857-2408

#### **Dr. Jeanette Wong**

Director of Curricular Support  
Representative to Masters Studies Council and Doctoral  
Studies Council  
626-815-6000 ex. 3710

#### **Brian Mercer, M.A.**

Manager of Curricular Support  
Representative to General Studies Council and  
Undergraduate Studies Council  
626-815-6000 ex. 2406

#### **Office of Curricular Support**

East Campus – Building 24  
ocs@apu.edu  
<http://www.apu.edu/ocs/>

**Insert Program Name**

*Dean – Name, Ext.; Chair – Name, Ext.; Program Director – Name, Ext.*

**STAGE 1 – School/College Initial Proposal (SCIP) Process**

<b>STEP</b>	<b>PROCESS</b>	<b>DATE COMPLETED</b>
1	OCS sends email reminder to the Academic Cabinet (AC) on proposal submission (email sent 1 month prior to AC meeting date).	
2	Program Director/Chair/Dean develops the SCIP* for New Programs/Initiatives. Must follow template. Complete the PRELIMINARY DRAFT budget. Must align with strategic priorities.	
3	Completed SCIP submitted by AC member to the Office of Curricular Support (OCS) at least 2 weeks prior to the Academic Cabinet (AC) meeting.	
4	OCS reviews, tracks, and prepares SCIP for Academic Cabinet (AC). OCS creates monthly report for AC summarizing all projects in the curricular review and approval process.	
5	OCS submits SCIP's to Provost Office for inclusion in AC agenda.	
6	Academic Cabinet reviews SCIP's in January, April, and October. If Academic Cabinet approves, SCIP forwarded to OCS. If Academic Cabinet denies, SCIP forwarded back to originating department.	
7	OCS determines if the SCIP needs WASC approval. Yes (Dept Chair meets with OCS to discuss WASC process). No (Proceed to PIP process).	
8	OCS notifies the school/college to develop the Program or Initiative Proposal (PIP) and move to Stage 2.	

\*Academic Cabinet documents for dean to complete include one or more of the following:

- SCIP Form
- PIP Form
- Academic Cabinet Program Change Form
- Budget Form
- Operations Committee Request Form (OPS Form) for positions only
- IMT Form

## STAGE 2 – Program or Initiative Proposal (PIP) Process

STEP	PROCESS	DATE COMPLETED
1	Program Director/Chair/Dean consults with related departments and completes PIP form:	
	Meet with Vice Provost to discuss proposal (Diane Guido, Kim Denu)	
	Consult with CFO to further develop DRAFT budget (Bob Johansen).	
	For Graduate & Non-Traditional Programs, contact Jo Witte to meet with Launch Team to discuss proposal (Graduate Center/Jo Witte, UR/Rafi Maljian, APS/Reiko Brink, CeLT/Bruce Simmerok).	
	For UG programs. Meet with UR for market analysis and competitor research (Rafi Maljian) and with David Dufault-Hunter regarding enrollment and admissions issues.	
2	Completed PIP (including DRAFT budget) submitted by AC member to the OCS one month prior to AC meeting.	
3	OCS reviews, tracks, and prepares PIP for Academic Cabinet.	
4	OCS submits PIP's to Provost Office for inclusion in AC agenda.	
5	Academic Cabinet Reviews PIP's in January, April, and October.	
	If Academic Cabinet approves, PIP returned to OCS.	
	If Academic Cabinet denies, PIP returned back to originating department.	
6	OCS provides Program Director/Chair/Dean with following forms to complete as appropriate:	
	Operations Committee Request Form (OPS Form) for positions only	
	IMT Form	
7	Program Director/Chair/Dean returns completed forms to OCS.	
8	OCS sends PIP and complete forms (#6) to The Administrative Cabinet (TAC) for review.	
9	TAC notifies OCS when review is complete and status of review; TAC sends OPS form to Operations Committee (OPS) for approval.	
10	OPS notifies OCS of budget approval status. OCS notifies Program Director/Chair/Dean.	
11	OCS sends out notification to the following departments that a new program or initiative has been approved by AC, reviewed by TAC and approved by OPS and will move on to Stage 3 Educational Effectiveness development and Council/Senate approval processes.	
	Provost & Vice Provost	
	Chair of The Administrative Cabinet (TAC) (Joy Specht)	
	Senate (Moderator)	
	Undergraduate Registrar's Office (Scott Douglas, Jeannette Cathey)	
	Graduate Registrar's Office (Norma Mocabee, Linda Mercer)	
	APS Registrar's Office (Judy Pederson, Reiko Brink)	
	Undergraduate Admissions Office (Kimberley Wiedefeld, Hayley Haslett, John Mooney, Gina Prust)	
	Graduate Admissions Office (Steve Syversen)	
	Graduate Student Support Services (Patrick Horn)	
	Regional Centers (Vickie Becker)	
	University Relations (David Peck, Rafi Maljian)	
	Faculty Employment & Communication (Carrie Beatty)	
	Human Resources (Stephanie Martin)	
	Center for Teaching, Learning and Assessment (CTLA) (Shawna Lafreniere)	
Center for e Learning and Teaching (Bruce Simmerok)		
Library (Dave Harmeyer)		
12	OCS notifies Dean/Chair to contacts HR (staff) or Faculty Employment & Communication (faculty) to begin process of developing job descriptions and hiring (if applicable).	
13	OCS contacts the Program Director/Chair/Dean to consult on development of Educational Effectiveness (EE) documents. This step may begin concurrent with or subsequent to PIP development (see Stage 3).	

### STAGE 3 – Educational Effectiveness (EE) Process

STEP	PROCESS	DATE COMPLETED
1	OCS contacts the Program Director/Chair/Dean to consult on the development of educational effectiveness (EE) documents* which may be concurrent or subsequent to PIP development.	
2	School/College develops EE documents*.	
3	Schools/College completes all internal (within the school) curricular review and approval processes.	
4	School/College meets with the following offices to consult on content of EE documents: For all online course/programs, meet with CeLT regarding course development and processes for implementation on the Learning Management System (Sakai). Meet with library liaison to discuss Information Literacy Competencies and Assessment. Email to University Relations (Rafi Malijian & universityrelations@apu.edu, UR) the proposed course description(s), one sentence course statement(s), and six key words to review for marketing strategy. Other departments offering similar courses to verify need for this course or ability to cross list course. State decision made and rationale. Meet with OCS to discuss new course numbers. OCS will confirm with Registrars Office. Meet with Center for Teaching, Learning, and Assessment (CTLA) (Shawna Lafreniere) for consultation on developing course outcomes, curricular map, and assessment plan. Develop TaskStream account for new programs.	
5	All online programs and courses have been approved by CeLT. CeLT notifies OCS.	
6	Completed EE documents submitted by originating department to OCS for review and approval. If approved, OCS adds the proposal to the UG/Masters/Doctoral Studies Curriculum Committee agenda for review and provides the committee monthly tracking records of the status of all proposals under review. If denied, OCS returns EE documents back to school/college to revise.	
7	For all General Studies courses, EE documents reviewed by General Studies Council (GSC) and OCS provides the committee monthly tracking records of the status of all proposals under review. If approved, GSC sends to UG Studies Council for approval If denied, returns EE documents back to school/college/department for revisions	
8	EE documents reviewed by UG/Masters/Doctoral Studies Curriculum Committee . If approved, Curriculum Committee sends via meeting minutes to UG/Masters/Doctoral Studies Council for approval If denied, returns EE documents back to Curriculum Committee	
9	UG/Masters/Doctoral Studies Council reviews recommendation by Curriculum Committee. If approved, UG/Masters/Doctoral Studies Council records on minutes and submitted via minutes to Faculty Senate If denied, Curriculum Committee Chair returns EE documents back to school/college to revise and resubmit to Council	
10	Faculty Senate reviews minutes of UG/Masters/Doctoral Studies Council. If Faculty Senate approves, EE documents are forwarded to appropriate Vice Provost for approval If Faculty Senate denies, documents are sent back to GS/UG/Masters/Doctoral Studies Council for revisions	
11	Vice Provost sends signed EE documents to OCS to implement archiving procedures.	
12	OCS sends out notification of new program or initiative final approval (See Stage 4).	

\*EE documents for department to complete include one or more of the following:

- Educational Effectiveness: New Program Proposal Form
- Educational Effectiveness: New Course Proposal Form
- Educational Effectiveness: Current Program Change Form
- Educational Effectiveness: Current Course Change Form
- Educational Effectiveness: Expedited Curricular Change Form
- Educational Effectiveness: CeLT Online Program/Course Form

## STAGE 4 – Implementation and Notification Process

STEP	PROCESS	DATE COMPLETED
1	Approved documents are sent by OCS to Imaging to scan document for archiving purposes (Sherry Colachico). Archiving notifies and returns original document to OCS.	
2	OCS sends out final notification of full approval to the following departments:	
	Undergraduate Registrar's Office (Camry Donnelly, Scott Douglas, Jeannette Cathey)	
	Graduate Registrar's Office (Norma Mocabee, Linda Mercer)	
	APS Registrar's Office (Judy Peterson, Reiko Brink)	
	Undergraduate Admissions Office (Kimberley Wiedefeld, Hayley Haslett, John Mooney, Gina Prust)	
	International Student Center (Mary Grams)	
	Graduate Admissions Office (Steve Syverson)	
	APS Admissions Manager (Carrie Tilton)	
	Graduate Student Support Services (Patrick Horn)	
	Regional Centers (Vickie Becker)	
	Undergraduate Catalog (Brian Mercer)	
	Graduate Catalog (Brian Mercer)	
	Business Office (Joyce Williams, Steve Jenne)	
	The Administrative Cabinet (TAC) (Joy Specht)	
	University Relations (David Peck, Rafi Maljian)	
	IMT (Jeff Birch)	
	Faculty Employment & Communication (Carrie Beatty)	
	Human Resources (Stephanie Martin)	
	Center for Teaching, Learning and Assessment (CTLA) (Shawna Lafreniere)	
	Center for eLearning and Teaching (Bruce Simmerok)	
	Dean	
	Associate Dean	
	Department Chair	
	Program Director	
	Provost or Vice Provost (Kim Battle-Walters Denu or Diane Guido)	
2A	If WASC approval is needed:	
	All personnel are notified in Step 2.	
	Meet with OCS office ( <i>plan for 2-8 months for approval</i> ).	
	Application completed by originating department. Check to pay WASC fee is requested by dept and paid for by originating school/dept/program (takes at least 2 weeks to get check cut).	
	Application and fee sent to WASC by OCS.	
	WASC review date.	
	WASC approval date.	
	Marketing materials must state "Pending WASC Approval".	
	Cannot admit students into the program until WASC approval complete.	
	WASC review process: 40 days for Fast-Track (online) and 6 months for full review.	
	Once WASC approval complete, all departments in Step 2 notified.	
2B	If no WASC approval is needed:	
	All personnel are notified in Step 1	
	You can start the program	
3	Department contacts University Relations to design marketing materials (if needed).	
4	Program Review is scheduled for 5 years after implementation date.	
5	OCS tracks until one month after implementation date.	
6	OCS adds new program to WASC Annual Report.	
7	OCA archives all proposals and stores originals.	
8	At completion of first and second year of new program or initiative, Dean/Chair sends completed "Achievement of Projection and Goals" form to OCS to document if target goals, student projections and goals were met.	
9	OCS sends completed form to TAC/OPS to trigger release of second (or third) year funding and addition of new faculty or staff positions as designated in original request.	

## Budget Form - Sample

(Available as an Excel document)

ASSUMPTIONS	SAMPLE	Year 1	Year 2	Year 3	Notes
		(broken out by term as applicable)			
1 # of news students enrolled	20	0	0	0	
2 # of returning students (year 2 and forward) minus attrition assumption)	0	0	0	0	
3 Total enrolled students (sums line 1 + 2)	20	0	0	0	
4					
5 REVENUE					
6 # of units per student	10	0	0	0	
7 Total # of units (multiplies line 3 by line 6)	200	0	0	0	
8 Price per unit	\$450	\$0	\$0	\$0	
9 Total projected revenue (multiplies line 7 by line 8)	\$90,000	\$0	\$0	\$0	
10 Fees per student	\$1,000	\$0	\$0	\$0	
11 Fee total (multiplies line 3 by line 10)	\$20,000	\$0			
12 Revenue subtotal (sums line 9 + line 11)	\$110,000	\$0	\$0	\$0	
13					
14 EXPENSES					
15 <i>Salaries</i>					
16 Faculty (estimate at \$85K per person) PeopleSoft Account # (512000)	\$85,000	\$0	\$0	\$0	
17 Adjunct Faculty (estimate at \$1,200 per unit) PeopleSoft Account # (512200)		\$0	\$0	\$0	
18 Staff (estimate at \$60K per person) PeopleSoft Account # (511000)	\$60,000	\$0	\$0	\$0	
19 Total salaries (sums line 16+17+18)	\$145,000	\$0	\$0	\$0	
20 Benefits (25% of Faculty and Staff Salaries line 16 + line 18) - PeopleSoft Account # (521000)	\$36,250	\$0	\$0	\$0	Benefits are calculated excluding Adjunct Salaries
21 Subtotal (sums line 19 + line 20)	\$181,250	\$0	\$0	\$0	
22					
23 DIRECT COSTS					
24 Travel and Meals - PeopleSoft Account # (533000)	\$500	\$0	\$0	\$0	
25 Advertising - PeopleSoft Account # (534000)	\$500	\$0	\$0	\$0	
26 Information Technology - PeopleSoft Account # (552000)	\$6,000	\$0	\$0	\$0	

27	Professional Services - PeopleSoft Account # (535000)	\$1,000	\$0	\$0	\$0	
28	Other Miscellaneous Costs (Office Supplies - PeopleSoft #531000) (Equipment - PeopleSoft # 532000) (Dues & Subscriptions - PeopleSoft # 536000)	\$2,000	\$0	\$0	\$0	
29	Total of direct costs (sums lines 24+25+26+27+28)	\$10,000	\$0	\$0	\$0	
30						
31	Subtotal (sums line 21 + line 29)	\$191,250	\$0	\$0	\$0	
32						
33	<b>INDIRECT COSTS</b>					
34	40% of projected expenses (multiplies line 31 by 40%)	\$76,500	\$0	\$0	\$0	Indirect costs include but are not limited to: Costs for HR, Enrollment, UR, IMT Facilities, Business Office, Legal , Auxiliary Services, Library, UG Student Life, Administration and Academic Support Services
35	Total Expenses (sums line 31 + line 34)	\$267,750	\$0	\$0	\$0	
36						
37	<b>NET</b>					
38	Net revenue (expenses) (line 21 minus line 35)	-\$157,750	\$0	\$0	\$0	