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10-2022

## Strategic Plan, Lindenwood 2026: Adapt, Build, Engage

Lindenwood University

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# STRATEGIC PLAN

LINDENWOOD 2026: ADAPT, BUILD, ENGAGE

FISCAL YEAR 2022-2023 VERSION 2.0

# MISSION, VISION, AND VALUES

LINDENWOOD 2026: ADAPT, BUILD, ENGAGE

Building on nearly 200 years of innovative teaching, Lindenwood University is committed to providing a world-class education that is accessible and affordable.

## THE NEXT GREAT LEARNER-CENTRIC UNIVERSITY

LINDENWOOD 2026: ADAPT, BUILD, ENGAGE



## OUR MISSION

Real Experience. Real Success.

Enhancing lives through quality education and professional preparatory experiences.

## OUR VISION

The Next Great Learner-Centric University

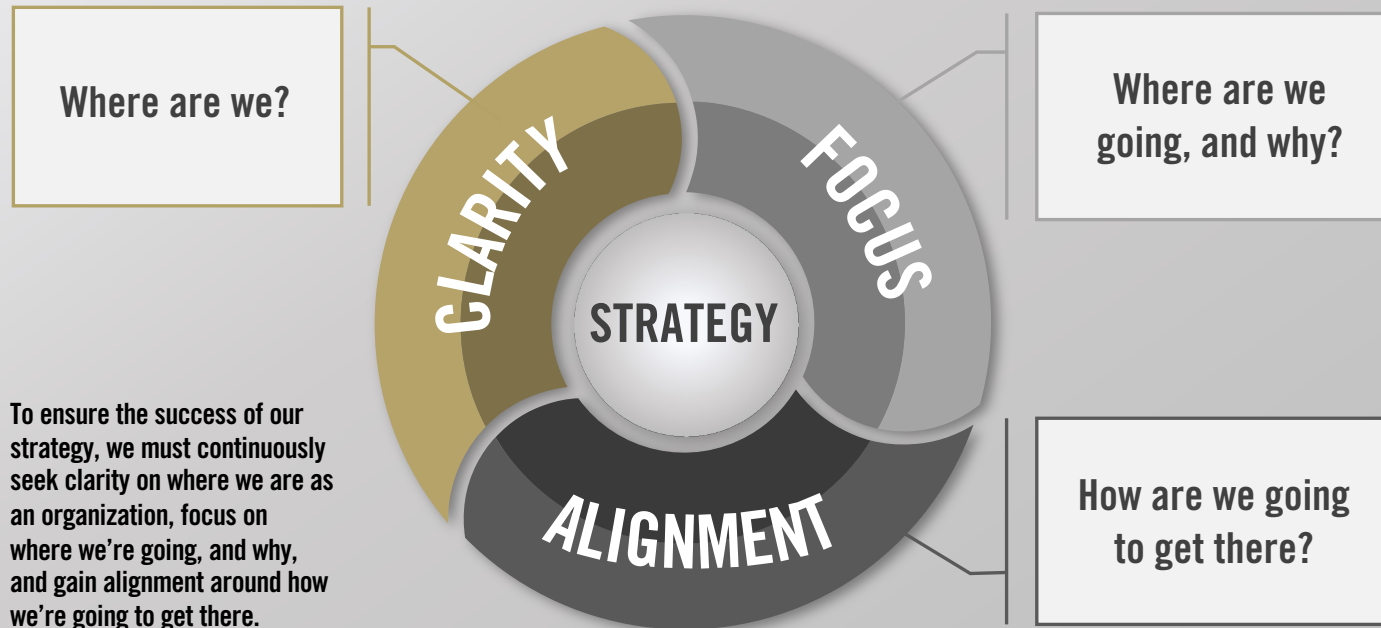
Lindenwood University, a nationally recognized institution of higher learning, delivers comprehensive student-centric learning and engagement through innovative, relevant, and forward-thinking academic and experiential programs.

## OUR VALUES

Excellence	Integrity	Service
Creativity	Teamwork	Dedication

To achieve our vision, we must continuously bring clarity, focus, and alignment to our strategy.

Strategy is a disciplined conversation around how we're going to get from where we are to where we want to be.



To ensure the success of our strategy, we must continuously seek clarity on where we are as an organization, focus on where we're going, and why, and gain alignment around how we're going to get there.

“A lack of alignment, according to a poll of global CEOs, is the number-one obstacle between strategy and execution.”

— Measure What Matters, by John Doerr

### PIVENS' BARRIERS TO STRATEGY

- Only 10% of organizations execute their strategy.
- Only 5% of the workforce understands the strategy.
- Only 25% of managers have incentives linked to their strategy.
- Only 40% of organizations link budgets to strategy.
- Only 15% of executive teams spend more than one hour per month discussing strategy.

Lindenwood's strategic plan was preceded by the most disruptive era in the history of modern higher education. We refer to this period as the "Decade of Disruption."

## DECADE OF DISRUPTION



**2011**

Stanford University offered the first massive open online course (MOOC) with 160,000 students registered and over 20,000 completing the course.



**2012**

MOOC provider Coursera launched. It is now the world's largest provider of online courses, partnering with 150 top colleges to serve over 82 million users.



**2013**

The nation experienced its first two-year decline in college enrollment since the 1990s. Nationally, enrollment fell by 2.2 million students between 2011 and 2020 (-12%).



**2014**

Western Governors University held its first Missouri commencement, graduating nearly 200 students. WGU now has more than 3,200 Missouri students. All are online.



**2015**

President Obama launched the College Scorecard to help consumers compare the cost and value of U.S. colleges and universities.

During this Decade of Disruption, Lindenwood's enrollment declined 40 percent from its peak in 2013 – a loss of 4,831 students.

## DECADE OF DISRUPTION



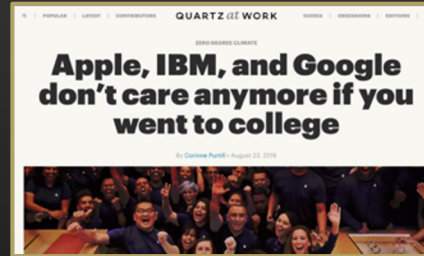
**2016**

Georgia Tech successfully concluded its experiment with online provider Udacity to deliver world-class computer science master's degrees at half the price.



**2017**

Purdue University, a top 50 land-grant institution, completed its acquisition of the for-profit Kaplan University and launched Purdue Global.



**2018**

As a slew of news articles began to appear touting top companies that no longer required college degrees, 61% of Americans felt higher ed was going in the wrong direction (Pew Research).



**2019**

Nationally, student loan debt reached \$1.6 trillion. Between 2019 and 2020, Generation Z experienced the largest year-over-year increase in student loan debt at 39%.



**2020**

In the spring of 2020, a global pandemic significantly disrupted higher education when colleges were required to cancel all in-person instruction.

A new generation now expects colleges to anticipate what they need and deliver it when and how they need it. This requires LU to take a more “learner centric” approach.

## EXPECTATIONS HAVE CHANGED

Gen Z learners want shorter, less expensive, more direct-to-career pathways in high-demand industries.

Question the Quo, 2022

68% of adults considering enrolling in education prefer non-degree pathways, up from 50% a year ago.

Strada Education, 2020

More learners want online education and experts predict online students will make up 25% of all college students within five years.

Education Dynamics, 2022

Today’s learners expect proactive outreach and a simplified and streamlined enrollment process through their smart phones.

Chronicle of Higher Education, 2022

Employers increasingly tout their willingness to “train on the job,” with 50% of IBM’s U.S. job openings not requiring a college degree.

Gallup, 2021

39 million adults have some college but no degree or credential. 655,908 of these adults live in Missouri. 1.9 million live in Illinois.

National Student Clearinghouse, 2022



# ADAPT, BUILD, ENGAGE

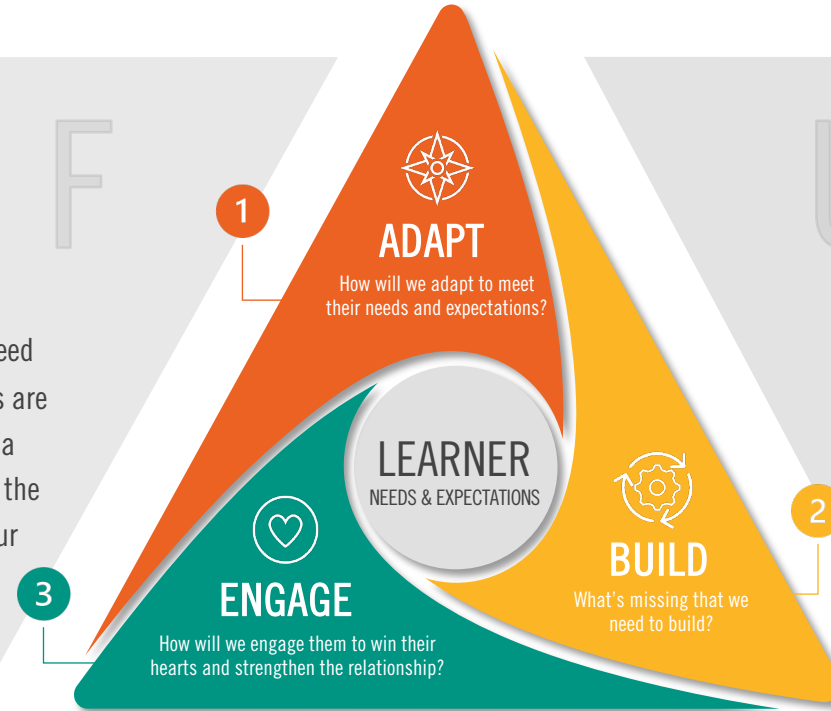
HOW LINDENWOOD PLANS TO BECOME  
THE NEXT GREAT LEARNER-CENTRIC UNIVERSITY



Lindenwood’s strategic framework identifies our Big Opportunity, outlines our Change Vision, and defines our Strategic Pillars – Adapt, Build, and Engage.

## BIG OPPORTUNITY

**LEARNER NEEDS AND EXPECTATIONS HAVE CHANGED.** A new generation of learners expect colleges to anticipate what they need and deliver it when and how they need it. Most colleges like ours are not designed around meeting these needs and expectations. As a result, our value has declined. An opportunity exists to redesign the university around learner needs and expectations and expand our audience over the next five years. With our incredible team and the right plan, we can do this. But it will require **seeing everything through the eyes of the learner.**



## CHANGE VISION

**WITHIN FIVE YEARS** we will be known as one of the most relevant, diverse, and beloved universities in the Midwest. We will positively impact tens of thousands of lives. We will help strengthen our local and regional economies. We will attract the best faculty and staff to join our team. We will have healthy and diverse revenue streams. Our brand will receive national recognition. And we will be well on our way to becoming **THE NEXT GREAT LEARNER-CENTRIC UNIVERSITY.**

**ADAPT TO THEIR NEEDS, BUILD WHAT’S MISSING, ENGAGE THEIR HEARTS**

## STRATEGIC PILLARS

### ADAPT

We will adapt our people, processes, and programs to meet the needs and expectations of a new generation of learners.

### BUILD

We will build speed to match the demands of the market, skills to meet “in-and-out” learner needs, and affordability to address the “crisis of cost.”

### ENGAGE

We will reach new learners in our market, attract them by demonstrating our difference, and retain them by loving our Lions.

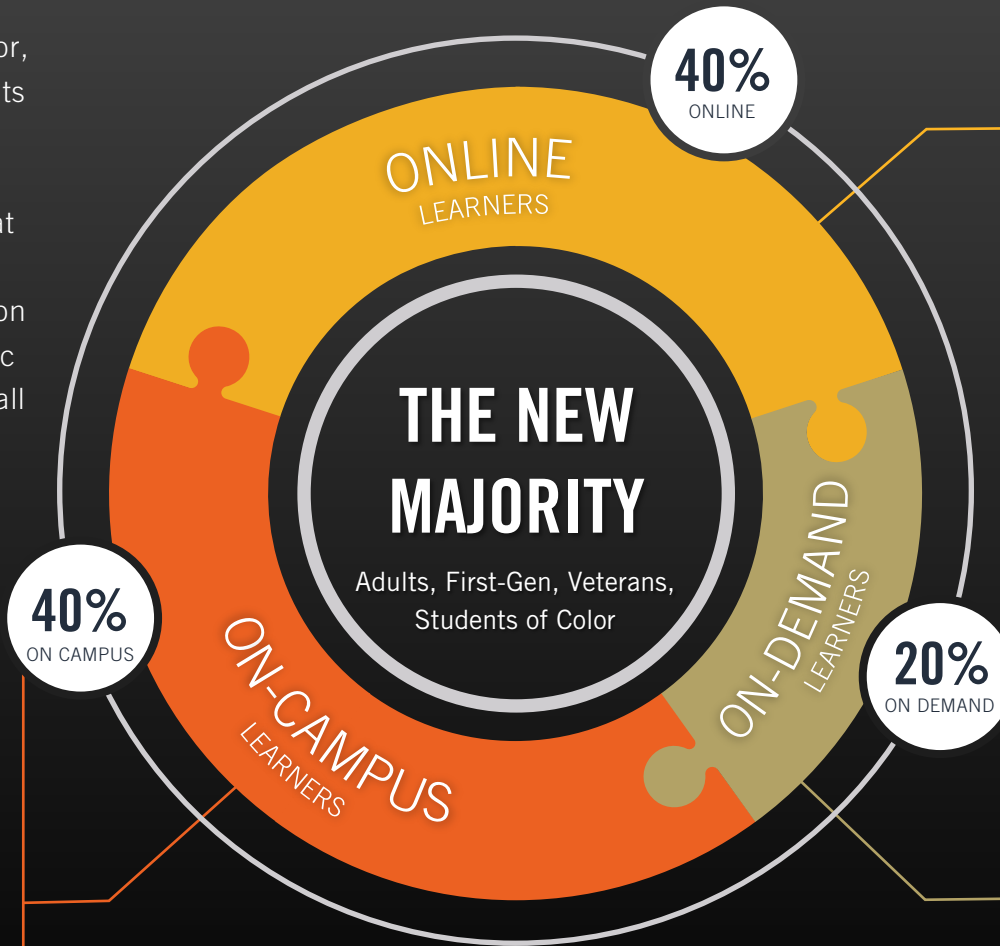


# TARGET AUDIENCE

At the center of Lindenwood’s strategy is “The New Majority,” which represents a new generation of learners that is focused on value, relevance, flexibility, and cost.

A new generation of learners called “The New Majority,” which includes adults, students of color, veterans, and first-generation students, represents the largest number of college-bound students. They are average to above-average learners looking for accessible, quality higher education at an affordable price. The New Majority falls into three types of learners: on campus, online, and on demand. Our strategy is to diversify our academic offerings around these three learner types. We call this strategy the “40-40-20 plan.” The plan calls for enrollment revenue to be 40% on campus, 40% online, and 20% on demand.

On-campus learners value a traditional campus experience that offers multiple learning modalities leading to a degree. These learners are either commuting to or living on campus and see the campus as their home base.



Online learners want degree pathways that provide the speed, flexibility, and accessibility to fit into their already busy lives. They are cost-sensitive and prefer all their courses and interactions to be online.

Acquisitions will play a key role in growing our “40-40-20” academic offerings.

On-demand learners want instant access to non-degree education to help them make progress toward acquiring a specific skill or career outcome. On-demand learners include those with and without college degrees.

VALUE, RELEVANCE, FLEXIBILITY, COST

# STRATEGIC OUTCOMES

Our strategic plan aims to achieve four outcomes by Fall 2026. The table below shows the milestones to be achieved as the plan progresses.

**12,000  
STUDENTS**

**100 NEW  
PARTNERS**

**A TOP-OF-  
MIND BRAND**

**\$165M IN  
REVENUE**

Outcomes	Fall 2022	Fall 2023	Fall 2024	Fall 2025	Fall 2026
12,000 Students	7,282	8,172	8,346	9,912	12,000
100 New Partnerships	12	25	50	75	100
Top-of-Mind Brand <sup>1</sup>	55%	58%	60%	63%	66%
\$165 Million in Revenue <sup>2</sup>	\$102.3M	\$105.7M	\$117.6M	\$141.1M	\$152.4M <sup>3</sup>

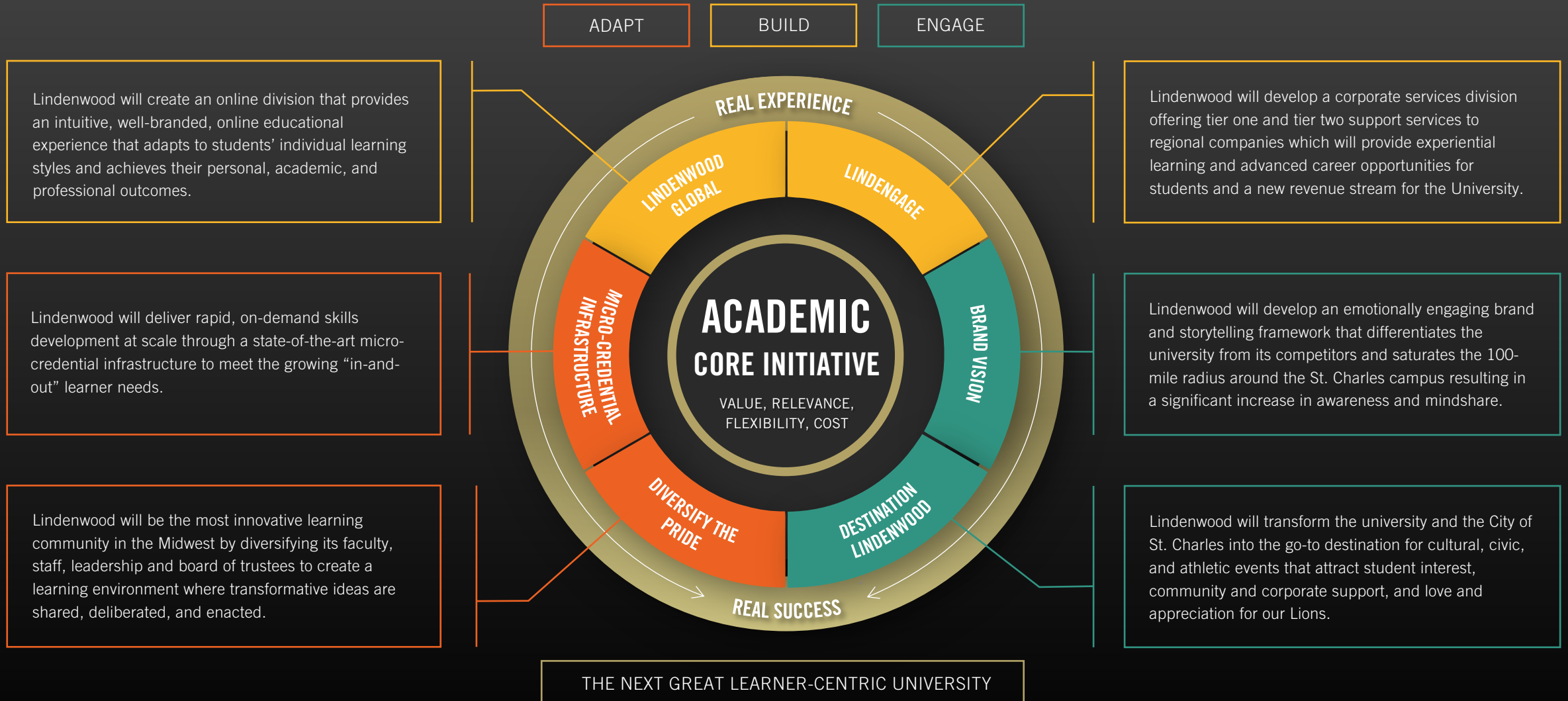
<sup>1</sup> Aided advertising recall. Baseline score in 2021 was 52% via Zeitgeist study.

<sup>2</sup> Excludes CARES funding.

<sup>3</sup> A \$12.6 million challenge remains and will likely be achieved through inorganic growth.

# STRATEGIC INITIATIVES

Seven strategic initiatives will help advance our **Real Experience, Real Success** mission and enable us to become **The Next Great Learner-Centric University** in the Midwest.





# ACADEMIC CORE INITIATIVE

ADVANCING OUR ACADEMIC MISSION

The Academic Core initiative will strategically adapt our traditional offerings to meet the changing needs and expectations of today's learners and prepare them to be job ready.



## THE INSIGHT

According to a recent EAB study, Gen Z learners\* are more likely than their predecessors to opt out of college completely. The study says, "Doubts about affordability and value make up a sizable share of the reasons why students are opting out." Between 2019-2021, national enrollment declined 6.5%, the largest two-year decline in the last 50 years.

## THE NEED

The same EAB research also shows that Gen Z students, post pandemic, are craving an educational experience that is fun and immersive, but one that is also affordable, provides the services they need, and is valuable in helping them obtain a good job upon graduation.

*\*66.6% of college students are aged 24 years and under.*



## ADAPT

We will adapt our people, processes, and programs to meet the needs and expectations of a new generation of learners.

## VISION FOR TRANSFORMATION

Lindenwood will create a best-in-class educational experience that raises the bar on our commitment to student success, displays our dedication to engaged learning, and delivers the value, relevance, flexibility, and affordability our learners need and expect.

## STRATEGIC OUTCOMES

- We will position our four colleges as marketplace leaders in our region.
- We will be a first-choice partner for impactful educational opportunities.
- We will create a first-year experience that helps our students know they belong at Lindenwood.



# SUPPORTING THE CORE

SIX STRATEGIC INITIATIVES SUPPORT THE ACADEMIC CORE INITIATIVE

Becoming The Next Great Learner-Centric University in the Midwest will require an innovative and diverse leadership team.



## THE INSIGHT

Increasing diversity is a moral imperative but a Boston Consulting Group study of more than 1,700 companies around the world also shows that diversity increases the capacity for innovation by expanding the range of a company's ideas and options, leading to better financial performance.

## THE NEED

Learners need and expect to learn from and alongside those with diverse perspectives and backgrounds. They want to form relationships with those who can respect, mentor, teach, and connect with diverse learners, and who involve a wide range of perspectives when creating solutions.



## ADAPT

We will adapt our people, processes, and programs to meet the needs and expectations of a new generation of learners.

## VISION FOR TRANSFORMATION

Lindenwood will be the most innovative learning community in the Midwest. To realize this vision, the university will diversify its faculty, staff, leadership and board of trustees to create a learning environment where transformative ideas are shared, deliberated, and enacted.

## STRATEGIC OUTCOMES

- Increased recruitment and retention of diverse faculty, staff, and trustees
- Increased number of innovative solutions
- Increased mentoring for career advancement
- Improved learning environment
- More welcoming community



Meeting the needs and expectations of today's learners will require Lindenwood to provide upskilling and reskilling opportunities for today's ever-changing job market.



## THE INSIGHT

According to Strada Education, 2 in 3 (68%) adults considering enrolling in education prefer nondegree pathways, up from 1 in 2 (50%) a year ago.

**MARCH 9, 2021** — Southern New Hampshire University acquired Kenzie Academy to expand access to in-demand micro-credentials.

## THE NEED

A growing number of learners need to develop specific skills to enter the job market more rapidly, without pursuing a four-year degree, while others need to learn new skills to stay current in their existing jobs, or transition to new jobs.



## ADAPT

We will adapt our people, processes, and programs to meet the needs and expectations of a new generation of learners.

## VISION FOR TRANSFORMATION

Lindenwood will deliver rapid, on-demand skills development at scale through a state-of-the-art micro-credential infrastructure to meet the growing “in-and-out” learner needs.

**DEFINITION:** Micro-credentials are a digital form of certification indicating demonstrated competency/mastery in a specific skill or set of skills.

## STRATEGIC OUTCOMES

- Increased partnerships with employers; co-created educational offerings
- K-12 pathways and remediation offerings
- Stackable options leading to degrees
- Career advancement opportunities for alumni
- Enhancements to current degree offerings

To serve the 39 million adults with some college but no credential, Lindenwood will need to provide pathways to degrees beyond the traditional semester-based system.



## THE INSIGHT

According to a joint report by the Boston Consulting Group and Arizona State University, the overall post-secondary student enrollment has been seeing a yearly decline of 1% to 2%, while the number of students taking online courses grows 5% annually.

## THE NEED

Millions of adults with some college but no degree or credential need 24/7 learning opportunities that allow them to pursue education on their own terms. The University needs to provide accessible, affordable, high-quality online education to meet the growing needs of today's learners and drive a greater share of its revenue.



## BUILD

We will build speed to match the demands of the market, skills to meet “in-and-out” learner needs, and affordability to address the “crisis of cost.”

## VISION FOR TRANSFORMATION

Lindenwood will create an online division that provides an intuitive, well-branded, online educational experience that adapts to students' individual learning styles and achieves their personal, academic, and professional outcomes.

## STRATEGIC OUTCOMES

- Create an online infrastructure that will revolutionize how we serve students and enable us to scale our operation and expand our reach
- Provide students with a consistent, high-quality online education experience
- Provide faculty with guidance, standardizations, support and incentives needed to best serve students

To provide “Real Experience and Real Success” in today’s tech economy will require Lindenwood to create its own “earn and learn” workplace experience for students.



## THE INSIGHT

An opportunity exists to leverage our IT expertise and students and provide product-specific help desk support to corporations focusing on cyber security, networking, and IT while giving our students real-world experience.

## THE NEED

Learners need hands-on learning experiences and skill sets that prepare them to enter the workforce with a good paying job. Companies need job-ready graduates who can contribute on day one. And the University needs alternative revenue sources to help sustain its mission.



## BUILD

We will build speed to match the demands of the market, skills to meet “in-and-out” learner needs, and affordability to address the “crisis of cost.”

## VISION FOR TRANSFORMATION

Lindenwood will develop a corporate services division offering tier one and tier two support services to regional companies which will provide experiential learning and advanced career opportunities for students and a new revenue stream for the University.

## STRATEGIC OUTCOMES

- Providing students with real-world experience in growing tech fields
- Providing opportunities to increase partnerships with regional employers that lead to student jobs
- Providing the University with an alternative revenue stream to help sustain its mission

To create a brand that matters, we must capture the essence of the Lindenwood experience and tell our story to a new generation of learners.



## THE INSIGHT

Generation Z prefer brands that are authentic, with 82% saying they trust a company more if it uses images of real customers in its advertising. Product quality, positive ratings and reviews and customer service are the top three characteristics that establish trust in a brand among Gen Z, according to the Center for Generational Kinetics.

## THE NEED

Learners need to emotionally connect with their university in ways that differentiate it from other options resulting in a brand vision that they can see themselves participating in.



## ENGAGE

We will reach new learners in our market, attract them by demonstrating our difference, and retain them by loving our Lions.

## VISION FOR TRANSFORMATION

Lindenwood will develop an emotionally engaging brand and storytelling framework that differentiates the university from its competitors and saturates the 100-mile radius around the St. Charles campus resulting in a significant increase in awareness and mindshare.

## STRATEGIC OUTCOMES

- A compelling brand with positive reviews
- A storytelling framework that makes it easy to talk about the Lindenwood difference
- Increased awareness in our critical target markets
- Increased students and donors; thrilled alumni
- A warm feeling when people think of Lindenwood

To attract more students to campus, we must create a compelling campus experience that positions Lindenwood as the go-to educational destination in our region.



## THE INSIGHT

Lindenwood sees an opportunity to create a college town experience that helps attract and retain students and builds community coalitions that mutually benefit the City and the University.

## THE NEED

Learners need to feel that Lindenwood is a welcoming community that provides the full “college town” experience they have come to expect from well-established universities. They need to feel involved and know that the town they are in loves their school and its students.



## ENGAGE

We will reach new learners in our market, attract them by demonstrating our difference, and retain them by loving our Lions.

## VISION FOR TRANSFORMATION

Lindenwood will transform the university and the City of St. Charles into the go-to destination for cultural, civic, and athletic events that attract student interest, community and corporate support, and love and appreciation for our Lions.

## STRATEGIC OUTCOMES

- Attract and retain students with a “home-away-from-home” experience
- Expose the community to the rich history and resources of the university
- Form new community coalitions that benefit our students and our university
- Strengthen our brand and increase our brand awareness



# GOALS AND OBJECTIVES

NINE GOALS AND 29 OBJECTIVES SHOW WHAT WE WILL DO  
THIS YEAR TO MOVE US CLOSER TO OUR VISION

# GOALS AND OBJECTIVES – 2022-23

**ADAPT** We will adapt our people, processes, and programs to meet the needs and expectations of a new generation of learners.

<p><b>GOAL 1</b></p> <p>Develop first-in-class processes that increase program efficiency and effectiveness resulting in greater value for our learners.</p>	<p><b>Objective 1:</b> Design and implement a repeatable business process review and refinement model that supports continuous improvement through process performance assessment and adjustment.</p>	<p><b>Owner:</b> TJ Rains, CIO, VP for Information Technology</p>
	<p><b>Objective 2:</b> Improve budgeting process to create budget expectations, priorities, and timelines.</p>	<p><b>Owner:</b> Rick Baniak, CFO, VP for Financial Affairs</p>
	<p><b>Objective 3:</b> Develop real-time revenue forecasts for enrollment, housing, and retention.</p>	<p><b>Owner:</b> Sara Wiedman, AVP for Financial Planning and Financial Operations</p>
<p><b>GOAL 2</b></p> <p>Strategically adapt our educational offerings to meet the changing needs and expectations of today's learners and prepare them to be job ready.</p>	<p><b>Objective 1:</b> Develop learner-centric strategic plans for each of our four colleges that align to the university vision and strategic outcomes.</p>	<p><b>Owner:</b> Bethany Alden-Rivers, Provost</p>
	<p><b>Objective 2:</b> Reduce the go-to-market process for new program development.</p>	<p><b>Owners:</b> Bethany Alden-Rivers, Provost and Joe Sallustio, Sr. VP for Strategic Enrollment Management and LU Global</p>
	<p><b>Objective 3:</b> Develop an instructional design process that allows us to quickly pivot successful programs to Lindenwood Global.</p>	<p><b>Owner:</b> Chief Digital Learning Officer</p>
<p><b>GOAL 3</b></p> <p>Create a culture of high performance, inclusion, and teamwork.</p>	<p><b>Objective 1:</b> Implement the Diversity, Equity, and Inclusion (DEI) four pillars of excellence.</p>	<p><b>Owner:</b> Emily Pitts, Chief Diversity Officer</p>
	<p><b>Objective 2:</b> Launch training programs that foster high-performance teamwork.</p>	<p><b>Owner:</b> Brittany Brown, Director, Employee Development, Human Resources</p>
	<p><b>Objective 3:</b> Implement a recognition system that encourages employees to live out our core values.</p>	<p><b>Owner:</b> Deb Ayres, Sr. VP, Human Resources</p>

# GOALS AND OBJECTIVES – 2022-23

**BUILD** We will build speed to match the demands of the market, skills to meet “in-and-out” learner needs, and affordability to address the “crisis of cost.”

<p><b>GOAL</b> <b>4</b></p> <p>Build a seamless enrollment system that matches the speed of the market.</p>	<p><b>Objective 1:</b> Develop a learner-centric sales system that anticipates student needs and quickly moves them through the decision-making process.</p>	<p><b>Owner:</b> Joe Sallustio, Sr. VP for Strategic Enrollment Management and LU Global</p>
	<p><b>Objective 2:</b> Develop learner-centric speed-to-lead capability that surpasses our regional competitors.</p>	<p><b>Owner:</b> Nate Watson, AVP for LU Global</p>
	<p><b>Objective 3:</b> Develop a system to turn around financial packages within 24 hours of admission.</p>	<p><b>Owner:</b> Cesar Perez, AVP for Student Financial Services</p>
<p><b>GOAL</b> <b>5</b></p> <p>Build a learner-centric education system that disrupts the region and delivers Real Experience and Real Success for our students.</p>	<p><b>Objective 1:</b> Develop LU Global model to transform 20% of our top online programs into eight-week, multi-start online programs by fall 2023.</p>	<p><b>Owner:</b> Chief Digital Learning Officer</p>
	<p><b>Objective 2:</b> Prototype and launch a workforce development platform that provides affordable, co-created, and stackable credentials to serve regional adult learners.</p>	<p><b>Owner:</b> Jeanine Cotter, VP for Business Development</p>
	<p><b>Objective 3:</b> Create a customer journey map for each student type that highlights critical touchpoints leading to a successful student experience.</p>	<p><b>Owner:</b> Carrie Rachal, AVP for Ground Enrollment</p>
	<p><b>Objective 4:</b> Acquire leading learner-centric institutions that will help us achieve our vision.</p>	<p><b>Owner:</b> Mark Falkowski, General Counsel</p>
<p><b>GOAL</b> <b>6</b></p> <p>Build an efficient and effective cost structure that increases the value and competitiveness of our residential, online, and hybrid programs.</p>	<p><b>Objective 1:</b> Conduct a brand value and price elasticity study of our top programs.</p>	<p><b>Owner:</b> Sara Wiedman, AVP for Financial Planning and Financial Operations</p>
	<p><b>Objective 2:</b> Develop pricing categories that make price and value clear to the learner.</p>	<p><b>Owner:</b> Joe Sallustio, Sr. VP for Strategic Enrollment Management and LU Global</p>



# GOALS AND OBJECTIVES – 2022-23

## ENGAGE We will reach new learners in our market, attract them by demonstrating our difference, and retain them by loving our Lions.

<p><b>GOAL 7</b></p> <p>Develop an engaging brand platform that captures the hearts and minds of a new generation of learners.</p>	<p><b>Objective 1:</b> Develop a value proposition and storytelling framework that leverages Lindenwood’s value and uniqueness in the region.</p>	<p><b>Owner:</b> Joe Sallustio, Sr. VP for Strategic Enrollment Management and LU Global</p>
	<p><b>Objective 2:</b> Create a visual identity and brand architecture that captures the learner-centric vision of the university.</p>	<p><b>Owner:</b> Joe Sallustio, Sr. VP for Strategic Enrollment Management and LU Global</p>
	<p><b>Objective 3:</b> Redesign our website to create an outstanding learner-first user experience.</p>	<p><b>Owner:</b> Joe Sallustio, Sr. VP for Strategic Enrollment Management and LU Global</p>
	<p><b>Objective 4:</b> Leverage our NCAA Division 1 transition to differentiate the LU brand.</p>	<p><b>Owner:</b> Joe Sallustio, Sr. VP for Strategic Enrollment Management and LU Global</p>
<p><b>GOAL 8</b></p> <p>Create an NCAA Division 1 collegiate experience that surpasses anything in the St. Louis market.</p>	<p><b>Objective 1:</b> Complete the transition to NCAA Division 1, Ohio Valley Conference and additional conferences needed for Division 1 competition.</p>	<p><b>Owner:</b> Jason Coomer, VP, Intercollegiate Athletics</p>
	<p><b>Objective 2:</b> Create an exceptional game-day experience that attracts students, employees, and community members to campus.</p>	<p><b>Owner:</b> Jason Coomer, VP, Intercollegiate Athletics</p>
	<p><b>Objective 3:</b> Develop a revenue stream from sponsorships and commercial programs that generates \$500,000 annually.</p>	<p><b>Owner:</b> Jason Coomer, VP, Intercollegiate Athletics</p>
<p><b>GOAL 9</b></p> <p>Develop an irresistible, home-away-from-home student experience that attracts and retains residential students.</p>	<p><b>Objective 1:</b> Conduct a comprehensive analysis to illuminate factors influencing traditional undergraduate persistence challenges and outline a set of recommendations.</p>	<p><b>Owner:</b> Bethany Alden-Rivers, Provost</p>
	<p><b>Objective 2:</b> Develop a community experience plan that engages students outside of the classroom to create bonds with fellow students.</p>	<p><b>Owner:</b> Kelly Moyich, AVP, Student Affairs Community, Equity and Inclusion</p>
	<p><b>Objective 3:</b> Create a campus-wide, early alert system that effectively retains learners.</p>	<p><b>Owner:</b> Kate Herrell, Assistant Provost, Academic Affairs</p>

# ACTION PLANS

Action plans were created for each objective to help ensure the successful execution of our strategic plan.

A		B		A		B		A		B		C		D		E		F		G	
1		2		1		2		1		2		3		4		5		6		7	
ENGAGE: We will reach new learners in our market		BUILD: We will build speed to match the demands		ADAPT: We will adapt our people, processes, and programs to meet the needs and expectations of a new generation of learners.																	
GOAL 9: Develop an irresistible, home-away-from-home experience		GOAL 4: Build a seamless enrollment system that matches student needs		GOAL 1: Develop first-in-class business processes that increase program/service efficiency and effectiveness resulting in greater value for our learners.																	
OBJECTIVE 3: Create a campus-wide, early alert system		OBJECTIVE 3: Develop a system to turn around financial		OBJECTIVE 1: Design and implement a repeatable business process review and refinement model that supports continuous improvement through process performance assessment and adjustment.																	
RATIONALE: We have existing systems (LindenCircle) and research-based approaches to providing timely interventions		RATIONALE: We have an inefficient business process which builds confusion to the customer(student) thus branding		RATIONALE: University business processes are currently designed and managed with minimal oversight and integration between units/departments. As such, anecdotal evidence suggests that the lack of integration between processes has created an environment where students are underserved, confused, and/or frustrated with the duplicative steps and ill-aligned process outcomes.																	
OWNER: Kate Herrell, Assoc. Provost for Academic Affairs		OWNER: Cesar Perez, AVP Student Financial Services		OWNER: TJ Rains, CIO and VP of Information Technology						DUE DATE: 3/1/2023											
OUTCOME: Formalize a protocol for using existing data		OUTCOME: An efficient and improved process across departments		OUTCOME: Improved business process efficiency, quality of communications, and integration between depts/units.																	
Action Steps	Action Description	Action Steps	Action Description	Action Steps	Action Description	Measurement	Start Date	End Date	Responsible Person												
1.0	Leverage LindenCircle for Student Engagement and Retention	1.0	Review Staffing: SFS Counselors & SFS Counselors	1.0	Identify and form BPR steering committee - Schedule Bi-Weekly Status Meetings. Steering Committee Membership includes VP for IT (Chair), Director of Enterprise Systems, AVP for SFS (Co-Chair), AVP for LUGlobal, AVP for Traditional, Director of Graduate, Registrar, Bursar, Assistant Provost for Academic Affairs, and Unit Process Owners	Formed and Chartered? Y/N; Commitment of Members Received	7/1/22	7/8/22	TJ Rains												
1.1	Build out more sophisticated Intervention within LindenCircle. The Intervention Inventory list of "rules" that trigger automated messages on conditions including but not limited to academic calendar, student attributes, and performance.	1.1	Demo of Anthology	1.1																	
1.2	Establish optimal Touchpoint Timeline. The Touchpoint Timeline is the schedule for frequent, timely communication with students throughout the academic year.	2.0	Relocation of Bursar to Spellman	2.0																	
1.3	Automate Targeted Communication Nudges and Awareness via LindenCircle	3.0	Anthology System Testing	3.0																	
2.0	Assess incoming cohort of FTTF to better understand their characteristics, risks, and needs	3.1	Anthology Development	3.1																	
2.1	Administer Intake Survey to incoming first-year students that collects information about student attitudes such as motivation, self-regulation, efficacy, and involvement.	3.2	Implement a Training Module	3.2																	
2.2	Merge data from intake survey with data on student attributes (e.g., First Gen, Race, Gender, Pell, GPA, early application, etc.)	4.0	Reimagine SFS /Bursar Dept. utilizing staff in specific positions	4.0																	
2.3	Faculty and Staff review FTTF data and action plan	5.0	CAMS vs Anthology	5.0																	
		6.0	Create a student experience from Admission handoff to SFS	6.0																	
		7.0	Revise Packaging methodology	7.0																	
		8.0	Policy & Procedure manual creation	8.0																	
				7.0	Pilot Methodology (ADVISING PROCESS) - Conduct business process re-engineering workshop for selected process.	Current State Business Process Map Complete; Future State Business Process Map Complete; Defined Performance Metrics	8/1/22	8/12/22	Advising Process Work Team												

# STRATEGY COUNCIL

The strategic plan is governed by the Strategy Council which meets weekly to discuss the refinement and execution of our strategy.



PRESIDENT

Dr. John Porter worked 33 years for IBM, the last 15 in senior management. He has also served as a board member in higher education and as an adjunct instructor and visiting professor. During his professional career, Porter has worked in numerous locations in the United States, as well as in South Africa and Dubai. He has an MBA from Washington University in St. Louis and a Doctor of Education degree from Johns Hopkins University.



PROVOST & VP ACADEMIC AFFAIRS

Dr. Bethany Alden-Rivers provides leadership for academic and student affairs, which includes academic programming, student achievement, and regional accreditation with the Higher Learning Commission. She has an MBA from Missouri State University. She holds a Master of Research and PhD in Learning, Assessment and Performance from the Institute of Educational Technology (Open University) in the UK.



VP STRATEGY & INNOVATION

Rob Westervelt leads the development and implementation of Lindenwood's five-year strategic plan. He is a Stanford-certified innovator with expertise in high-performance leadership and strategic change. Over his 25-year career in higher education, Rob has led a wide range of departments and has successfully rebranded organizations, led turnarounds, and generated more than \$65 million in net revenues.



SVP HUMAN RESOURCES

Dr. Deb Ayres' responsibilities include leadership and oversight of HR, benefits, employee performance and development, and payroll functions for approximately 2,000 full and part time employees. Prior to leading HR functions for the university, Dr. Ayres served the Lindenwood College of Education and Human Services as an Associate Professor and Department Chair in the Educational Leadership Department. She has over 30 years of experience leading HR divisions.



SVP STRATEGIC ENROLLMENT

Dr. Joe Sallustio is part of a select group of higher education executives with extensive experience within the critical verticals of operations, finance, and academics. Having led teams in every function of university operations in both non-profit universities and for-profit colleges, he brings essential knowledge necessary to scale on-ground and online growth initiatives. He holds an EdD in Organizational Leadership from Northcentral University.



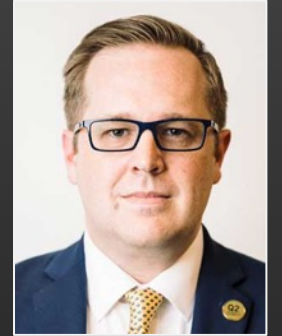
GENERAL COUNSEL

Mark Falkowski has extensive experience as a higher education attorney in both private practice as a member of the higher education practice group for a large national law firm and as general counsel. He has successfully represented institutions in regulatory matters and in state and federal courts. Falkowski's legal experience supports all areas of University operations. He also handles corporate, governance, and transactional matters for the University.



CHIEF FINANCIAL OFFICER

Rick Baniak is responsible for all treasury and financial functions of the University. Prior to Lindenwood, he served as vice chancellor of finance and administration and Chief Financial Officer for the University of Missouri– St. Louis (UMSL) and the Chief Transformation Officer for the University of Missouri system. He spent the remainder of his career in aerospace finance, including multiple financial executive roles at Boeing.



VP INSTITUTIONAL TECHNOLOGY

TJ Rains is responsible for leading the Information Technology team in delivering relevant, well managed IT services to the faculty, staff, and students. Rains works collaboratively with institutional leadership to ensure proper alignment between technology strategic/operational plans and university goals and strategic goals/objectives. His prior experience includes executive leadership roles at Cardinal Stritch University and Emporia State University.



# LINDENWOOD UNIVERSITY

THE NEXT GREAT LEARNER-CENTRIC UNIVERSITY

“ADAPT TO THEIR NEEDS, BUILD WHAT’S MISSING, ENGAGE THEIR HEARTS”

For more information regarding the strategic plan, please contact  
Rob Westervelt, Vice President for Strategy and Innovation  
[rwestervelt@lindenwood.edu](mailto:rwestervelt@lindenwood.edu)