

# 2016-17 PRESIDENT'S YEAR-END SUMMARY



LINDENWOOD  
LIKE NO OTHER

# LINDENWOOD

LIKE NO OTHER

**There's something about Lindenwood University that makes it like no place else and something about our students, alumni, faculty, and staff that sets them apart.**

We've been around since 1827, and one of our proudest traditions is how well we adapt to the needs of our students and how we do our part to keep every member of the Lindenwood family on a path to success.

We do things differently here, and it shows. Opportunity abounds in this community as we invest in the strengths of our diverse student body. In all we do, we go above and beyond to provide an atmosphere where students can excel and grow, where faculty and staff members are passionate and approachable, and where community can thrive.

Geile Leon,  
Marketing and Communications, 2015



Michael D. Shonrock, Ph.D.  
President, Lindenwood University System  
July 29, 2016



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## LEADERSHIP PROFILE

The **Leadership Profile for the 22nd President of Lindenwood University** states that “The next president will lead the university into the future by consolidating the gains of the last 20 years, continuing strong financial management and entrepreneurial program development, supporting academic excellence and student focus, developing community relations and building the brand, and raising funds to support Lindenwood’s goals and mission.”

The **President’s Year-End Report 2015-2016** will highlight accomplishments associated with goals articulated by the Board of Directors in the Leadership Profile over the past 12 months and goals developed by the president along with members of the leadership team, over the next 12 months for the Lindenwood University System.

### REFLECTIONS ON THE FIRST YEAR

Throughout the past year, the leadership team has discussed the importance of **MISSION** versus **MISSION-CRITICAL** associated with the allocation and/or reallocation of financial resources.

Throughout the past year, the university has generally focused on **TACTICAL PLANNING** (e.g., specific planning to achieve a particular goal within 10 years, such as building a facility). Now, the leadership team will begin focusing on **STRATEGIC PLANNING** (e.g., a general plan to achieve a particular goal over the next 10-20 years, such as enrollment planning).

### TAKE AWAY

“Leadership in a (Permanent) Crisis” by Ronald Heifetz, Alexander Grashow, and Marty Linsky, *Harvard Business Review* suggests that leadership will require new skills tailored to **an environment of urgency that fosters adaptation**, helping people develop the next practices and enable the organization to thrive even as they continue with the best practices necessary for current success, and that generates leadership, giving people at all levels of the organization the opportunity to lead and adapt to changing times.



# BUILDING A LEADERSHIP TEAM

**The Leadership Profile** for the 22nd President of Lindenwood University highlighted the areas supervised including finance, personnel, facilities, academic programs, institutional advancement, student development, admissions, branch campuses and locations, computer services, public relations and marketing, executive communications, community relations, and athletics, along with **officers reporting to the president** including provost and vice president for academic affairs, president Belleville campus, vice president for human resources, vice president for operations, vice president for student development, vice president for institutional advancement (development), vice president for enrollment management, chief information officer (vice president for information technology), director of public relations and marketing, director of executive communications, director of community relations, athletics director (vice president for intercollegiate athletics), and in-house legal counsel (general counsel).

The Leadership Profile noted the importance of hiring and supervising senior administrative leaders and helping them **work together effectively**.

## ESTABLISHMENT OF SENIOR LEADERSHIP RETREATS

During the first 100 days, we **assessed the current state** of the areas supervised and **assessed the desired state** of the areas supervised through the first senior leadership team retreat (including officers reporting to the president and other academic and administrative team leaders) facilitated by the Kansas Leadership Center. **Recognizing the gap between the current and desired state**, along with technical challenges facing the university system, the second senior leadership team retreat focused on priority management noting **adaptive challenges** for the senior leadership team members with an emphasis on **working together effectively**.

## FOUNDING OF PRESIDENT'S CABINET AND PRESIDENT'S COUNCIL

The President's Cabinet was established and met monthly during 2015-2016 and will begin meeting bi-monthly during 2016-2017; the President's Council (including academic deans and other senior academic and administrative leaders, and representatives from the Faculty Council, Staff Council and Lindenwood Student Government Association) was established and met monthly during 2015-2016 and will begin meeting quarterly during 2016-2017.

The President's Cabinet held retreats on **adaptive leadership, priority management, student retention, and strategic planning** during 2015-2016 and has scheduled strategic planning retreats for 2016-2017 (July, August, January, July).

## BUILDING A LEADERSHIP TEAM



### Selection and Appointment of Executive Assistant to the President Stefani Schuette

Mrs. Schuette was appointed as the executive assistant to the president, effective June 15, 2015, recognizing the breadth and depth associated with the system president position and opportunities and expectations articulated from the Board of Directors through the presidential search process. Mrs. Schuette appointed Kim Gersman as the new secretary for the Board of Directors, effective August 1, 2015. During the last year, Mrs. Schuette has assisted with the searches for leadership team members and has participated in a number of professional development opportunities, including the WHY Discovery Workshop and American Council on Education President's Assistants Conference.

Mrs. Schuette is our liaison with The Gallup Organization and serves as the system president's appointed administrative liaison to the Board of Director's Executive Committee and Board of Directors, along with Mrs. Gersman.



### Selection and Appointment of Vice President for Information Technology T.J. Rains

Mr. Rains was appointed as the vice president for information technology and chief information officer, effective September 1, 2015. Since his appointment, Mr. Rains has participated in a number of professional development opportunities including Educause (Leading Transformational Change) and Workday. Prior to his appointment, Acropolis was hired to conduct an audit of the information technology programs and services and reported their findings at the Board of Directors Summer Retreat on July 18, 2015.

Mr. Rains is our technical liaison with Workday Human Resources, Workday Financial Management, and Workday Student Information and serves as the system president's appointed administrative liaison to the Board of Director's Strategic Planning Committee.



### Selection and Appointment of Campus President Brett Barger

Dr. Barger was appointed as the campus president of the Lindenwood University Belleville campus, effective October 1, 2015. Since his appointment, Dr. Barger has participated in a number of professional development opportunities, including the President's Institute sponsored by the Council of Independent Colleges. Dr. Barger and his family now permanently reside in Belleville, Illinois.

Dr. Barger is our liaison with the JF Smith Group (fundraising and alumni) for the Belleville campus and serves as the system president's appointed alternate administrative liaison to the Board of Director's Executive Committee and Board of Directors.

# BUILDING A LEADERSHIP TEAM



## Selection and Appointment of Provost

### Marilyn Abbott

Dr. Abbott, after a national search conducted by Witt/Kieffer, including a Provost Search Advisory Committee appointed by the system president with representation from the board and university faculty/staff/students, was appointed as the provost and vice president for academic affairs, effective January 1, 2016. Prior to her appointment, Dr. Abbott served as interim

provost and vice president for academic affairs, associate provost, academic dean, and academic department chair at Lindenwood University. Since her appointment, Dr. Abbott has participated in a number of professional development opportunities including the New Provost Workshop & Provost Annual Meeting sponsored by the Council of Independent Colleges and Higher Learning Commission.

Dr. Abbott is our liaison with Ruffalo Noel-Levitz (student retention) and will serve as the system president's appointed administrative liaison to newly proposed (pending board approval) Board of Director's Accreditation Sub-Committee of the Finance & Audit Committee.



## Selection and Appointment of General Counsel

### Grant Shostak

Mr. Shostak was hired as the vice president and general counsel, effective January 1, 2016. Mr. Shostak has participated in a number of professional development opportunities including the National Association of College & University Attorneys.

Mr. Shostak serves as the system president's appointed administrative liaison to the Board of Director's Executive Committee and Board of Directors, as well as general counsel for the Lindenwood University system.



## Selection and Appointment of Vice President for Development and Alumni Relations

### Dan Grigg

Mr. Grigg, after a national search assisted by the JF Smith Group, including meetings with members of the Board of Directors and vice presidents, was appointed as the vice president for development and alumni relations,

effective February 1, 2016. Prior to his appointment, the JF Smith Group was contacted to assess the fundraising and alumni relations programs and services and later was hired to assist with the re-organization of the development and alumni programs. Since his appointment, Mr. Grigg has participated in a number of professional development opportunities including the Planned Giving Workshop.

Mr. Grigg is our primary liaison with the JF Smith Group (fundraising and alumni) for both the St. Charles and Belleville campuses and serves as the system president's appointed administrative liaison to the Board of Director's Fundraising and Development Committee.

## BUILDING A LEADERSHIP TEAM



### Selection and Appointment of Vice President for Financial Affairs

#### Greg Phelps

Mr. Phelps, after meetings with the vice presidents, was appointed as the vice president for financial affairs and chief financial officer, effective March 1, 2016. Since his appointment, Mr. Phelps has participated in a number of professional development opportunities including the National Association of College & University Business Officers.

Mr. Phelps is our liaison with Workday Financial Management and Hastings & Chivetta (campus master planning) and serves as the system president's appointed administrative liaison to the Board of Director's Finance & Audit Committee (including the investment committee).



### Selection and Appointment of Vice President for Intercollegiate Athletics

#### Brad Wachler

Mr. Wachler, after a national search conducted by Witt/Kieffer, including an Athletics Director Search Advisory Committee appointed by the system president with representation from the board and university faculty/staff/students, was appointed as the vice president for intercollegiate athletics, effective July 1,

2016. Prior to this appointment, Collegiate Consultants (athletics) was hired to assess the NCAA and Student Life Sports programs in St. Charles and NAIA and Student Life Sports programs in Belleville. Mr. Wachler will participate in future professional development opportunities associated with the Mid-America Intercollegiate Athletics Association (MIAA) and National Collegiate Athletics Association (NCAA).

Mr. Wachler will serve as the system president's appointed administrative liaison to the Board of Director's Athletics Committee.



### Continued Appointment of Vice President for Human Resources

#### Deb Ayres

Dr. Ayres, the vice president for human resources, began her appointment on July 1, 2013. During the last year, Dr. Ayres has participated in a number of professional development opportunities, including Affordable Care Act Compliance training, FLSA Regulations training, International Employee Compliance training, KLC Leadership training, and Workday training. Dr. Ayres

continues to provide leadership with the transition of the former Work and Learn Program to the new Student Worker Program prompted by regulations from the Internal Revenue Service and Department of Labor.

Dr. Ayres is our liaison with Workday Human Resources and our liaison with the Kansas Leadership Center (adaptive leadership training) and will serve as the system president's appointed administrative liaison to the Board of Director's Board Development Committee.



# BUILDING A LEADERSHIP TEAM



## Continued Appointment of Vice President for Student Development Ryan Guffey

Dr. Guffey, the vice president for student development, began his appointment on June 1, 2014. During the last year, Dr. Guffey has participated in a number of professional development opportunities and is currently participating in the Harvard University Institute for Education Management (Harvard IEM). Dr. Guffey now provides oversight of the Pedestal Food Service

contract and the Barnes & Noble College Bookstore contract.

Dr. Guffey is our liaison with Barnes & Noble College Bookstore and Pedestal Food Services and will serve as the system president's appointed administrative liaison to the Board of Directors' Mission & Purpose Committee.



## Continued Appointment of Vice President for Enrollment Management Joe Parisi

Dr. Parisi, the vice president for enrollment management, began his appointment on December 1, 2013. During the last year, Dr. Parisi has participated in a number of professional development opportunities, including the Strategic Enrollment Management Conference sponsored

by Ruffalo Noel-Levitz. Dr. Parisi now supervises the Marketing Department, aligning the new brand and marketing campaign, and will provide direction for future strategic enrollment planning.

Dr. Parisi is our primary liaison with Geile Leon (marketing and communications) and Ruffalo Noel-Levitz (enrollment management) and will serve as the system president's appointed administrative liaison to the Board of Directors' Facilities Committee and Real Estate Sub-Committee.



## BUILDING A LEADERSHIP TEAM

As part of the annual performance evaluations of leadership team members, the president requested that Vice President Deb Ayres develop a brief leadership survey soliciting feedback from the vice presidents as follows:

### **“What changes implemented by the President in the past 12 months will most positively impact the university’s success for the long term?”**

Restructuring of the academic schools and divisions

Campus master planning and reallocation of university resources with the transfer of the Boone Heritage Center and sale of the Nursing & Allied Health facility

National and local searches for senior leadership team members in mission-critical areas of the university system

Investment and implementation of 21st century software solutions (Workday, Canvas, etc.)

Mission-driven focus prioritizing on student engagement and student retention

Utilization of external partnerships, particularly Ruffalo Noel-Levitz-related enrollment, financial aid and retention support

Creating a WOW factor for the campus community with Pedestal Food Service creating new meal options and adding brand names, including Chick-fil-A, Qdoba, Caribou Coffee, Barnes & Noble College Bookstore, and Under Armour

### **“What would you like the president to focus more time, resources, or attention on in the next 12 months?”**

Continuing working with our Board of Directors on defining governance and operational roles and best practices for the university system

Along with your leadership team, continue timely communications within the campus community

Formulating a new strategic plan and articulating the short- and long-term goals of the campuses and university system

Building a strong, knowledgeable, leadership team



# LAST 12 MONTHS

The **Leadership Profile for the 22nd President of Lindenwood University** noted the importance of continuing strong financial management and entrepreneurial program development, supporting academic excellence and student focus, developing community relations and building the brand, and raising funds to support Lindenwood's goals and mission.

The following summary describes some of the challenges facing the leadership team during the 2015-2016 academic school year. The **challenges** were seen as **opportunities** for accomplishment during the last **12 months**.

## PLANNING

During the **first 60 days**, members of the leadership team began the process of planning for the future of the Lindenwood University system. After a number of meetings, two needs become evident: **engaging the campus community** with **campus master planning** and utilizing the campus master planning process to engage the campus community with **strategic planning**. An informal request for proposal from local/regional architectural/design firms resulted in presentations to members of the campus community. Hastings & Chivetta was selected as the campus master planning consultant to present before the Board of Directors on July 18, 2015.

Early during the planning process, recognizing the lack of data and information supporting a **student-centered mission** for the university system, **The Gallup Organization** was invited to present to the Board of Directors on July 18, 2015. The following month, The Gallup Organization was selected to engage Lindenwood University in a national study surveying alumni and undergraduate students. Results of the study titled "Great Jobs, Great Lives, Great Experiences" provided insight into the **student experience** regarding well-being, workplace engagement, and alumni attachment influencing the consolidation of academic programs, the need to enhance student support services, and the need to engage alumni.

It was also evident during the **first 60 days**, the leadership team must address the Acropolis audit report to the Board of Directors regarding the current state of information technology and Acropolis' interim management of the information technology departments (audit & management). TJ Rains was appointed as Vice President for Information Technology. This provided the leadership team an opportunity to begin the **IT strategic planning process** to immediately address hardware and software issues resulting in the early adoption of Workday Human Resources (e.g., monitoring of personnel costs; providing organizational structure, and providing effective onboarding for new employees) for the university system; and enhancements such as Palo Alto next generation firewall for the university system; AT&T Mobility solutions for security/facilities/admissions personnel; Lynda.Com online professional development tools for faculty, staff and students; Office 365 migration; and CANVAS learning management system.

Recognizing the **need for data and information** that directly impact the Board of Directors' expectation of strong financial management of the university system, the JF Smith Group and Ruffalo Noel Levitz were engaged to enhance our fundraising and enrollment strategies.

The JF Smith Group provided ongoing training and education of the development staff critical to fundraising, assisted the development and alumni staff setting up tracking fields and reporting infrastructure with **Raisers Edge** software, analyzed and implemented a new fundraising infrastructure, developed the **first-ever solicitation proposals** for the LARC campaign and future campaigns, provided tools necessary to assess prospect's giving capacity prior to cultivation and solicitation, and personally accompanied development staff with major gift solicitations.

## LAST 12 MONTHS

Upon the appointment of the new Vice President for Development and Alumni Relations, the JF Smith Group continued their engagement with the development of new benchmarks and expectations of the development and alumni staff. The leadership team recognized the need to enhance fundraising and alumni programs for the continued successful financial position of the university system.

Ruffalo Noel Levitz assisted our enrollment management team with developing the first-ever **Comprehensive Inquiry Management** (CIM) program building our undergraduate search process including inquires, applications, and admits (e.g., 528 new inquires, 170 new applications, and 135 new admits to date), the first-ever **Enhanced Search Strategy** purchasing listings of and search strategies for prospective new students outside our current geo-targets at the sophomore and junior years, and the first-ever **Enrollment Revenue & Management System** providing planning and analysis tools related to tuition pricing, financial aid awarding, net revenue, and an in-depth understanding of the university system's tuition discount rate. Ruffalo Noel Levitz assisted our academic affairs team with the initial development of the first-ever freshman **retention programs and services**, including web-based dashboard for data analysis, risk factors, and predictive modeling.

During the last year, **planning** was essential for the leadership team, enhancing communication, thinking strategically, and focusing on mission-critical programs and services to meet and exceed the expectations of the Board of Directors.

### FINANCIAL MANAGEMENT AND ENTREPRENEURIAL PROGRAMS

For the first time in a decade, recognizing the impact to students and families associated with the cost of attendance, the president recommended to the Board of Directors that there be **no increase** in tuition for the 2016-2017 academic year. The Board did approve an increase in room and board, primarily to support the \$4 million (includes \$2 million from Pedestal) dining hall renovation projects in **Spellmann, Evans, and Matt's**, and an increase in the technology fee (individual technology fees consolidated), primarily to support enhancements to on-campus Wi-Fi, a new learning management system, and classroom technology updates.

The Board of Director's Finance & Audit Committee was provided additional detail regarding the university systems' revenue and particularly expenditures for the FY16 budget in preparation for the FY17 budget. Planning is underway to present to the Board of Directors the next fiscal year's budget at the end of the Fall semester rather than delaying consideration to the end of the Spring semester.

The transfer of the Boone Heritage Center to St. Charles County was completed, officially creating **Lindenwood Park**, and eliminating annual expenditures associated with personnel, facilities management, and operations, which will result in significant savings to the university system.

The transfer of the **Nursing & Allied Health** academic program back to the St. Charles campus was completed, with discussions with SSM Health (St. Charles) regarding a future partnership with the Nursing program. A real estate representative was selected to sell the current Nursing & Allied Health facility, which will result in significant savings.

The university system discontinued the leasing of overflow student housing and purchasing of additional off-campus student housing for the Belleville and St. Charles campuses, which will result in significant savings to the university system.

## LAST 12 MONTHS

The vice president for financial affairs and chief financial officer now meets with the vice presidents to review, discuss, and prioritize expenditures and provides updates on revenue and expenditures at Presidents' Cabinet and President's Council meetings

The president and vice president for financial affairs and chief financial officer now review mid-year revenue and expenditures utilizing the information to project end-of-the-year results. They also utilize the information, with feedback from the vice presidents, to develop the upcoming fiscal budget.

Finalized contracts with Cedarhurst Assisted Living, Midwest Bank Centre, Arby's, and Raising Cane's for University Commons, which will generate significant revenue to the university system.

The president and vice president for financial affairs and chief financial officer have confirmed that DESCO is now providing approximately **\$725,000** annual rent from University Commons, which will continue to provide revenue to the university system.

The president and leadership team secured a **\$2 million** grant from the Koch Foundation for the Hammond Institute for Free Enterprise, the largest grant in the history of the university system.

### ACADEMIC EXCELLENCE AND STUDENT FOCUS

Focusing on the importance of building the academic reputation of the university system, the president recommended to the provost and vice president for academic affairs that she consider the realignment of the academic schools. The result is as follows:

The **School of Arts, Media and Communication**, a merger of the School of Fine and Performing Arts and the School of Communications

The **School of Health Services**, a merger of the School of Sport, Recreation, Exercise Science and the School of Nursing, returning nursing and allied health to the St. Charles campus

The **School of Sciences**, including a department from the School of Human Services

The **School of Humanities**, including a department from the School of Human Services

The **School of Education**, including a department from the School of Human Services

The **School of Business & Entrepreneurism**, including a department from the School of Human Services

Contending that issues of shared governance no longer exist at Lindenwood, the American Association of University Professors (**AAUP**) voted unanimously at its June meeting to lift a longstanding sanction of the university.

The president and provost and vice president for academic affairs established the Office of **Institutional Effectiveness** to consolidate institutional research and coordinate accreditation with the Higher Learning Commission including the assessment of student outcomes.

The leadership team established the Downtown St. Louis **Old Post Office** academic extension site, consolidating the downtown St. Louis (Washington Street) and West County Wildwood academic extension sites.

**1,039**  
MAY GRADUATES

**15,537**  
UNDUPLICATED  
HEADCOUNT

## LAST 12 MONTHS

The leadership team directed the installment of the CANVAS **Learning Management System**, providing enhanced academic support for students and faculty for online, hybrid, and face-to-face undergraduate and graduate offerings, replacing Blackboard and resulting in cost savings over the next five years.

The leadership team enhanced academic planning through the first-ever establishment of **Four-Year Academic Calendars** for the Lindenwood University System.

The leadership team initiated the first-ever summer academic program for incoming freshman, offering **free online general education courses** to enhance earlier academic engagement and academic progress, supported from cost-savings with the elimination of J-Term.

The leadership team enhanced the meaningfulness of the commencement ceremony by having students seated by academic school, congratulated by their respective academic dean, and information regarding their hometown and other degrees printed in the commencement program.

The leadership team recommended and the Board of Directors approved a remodeling of the dining facilities within Spellmann Center, Evans Commons, and Matt's Café. Pedestal Food Service will introduce **national brands**, Chick-fil-A, Qdoba, Einstein's, and Caribou Coffee, including new flexible meal plans beginning in the Fall semester 2016.

The leadership team, selected **Barnes & Noble College Bookstore** as the university system bookstore and merchandise partner, remodeling the former Spirit Shoppe and enhancing engagement and services with students and faculty, including a robust online store, providing significant revenue for the university.

The president and his leadership team designated Evans Commons as a **student engagement facility** with a new Wellness Center, Student Involvement Office, Housing Office, centralized mail service, and enhanced laundry service.

Based on recommendations from the Lindenwood Student Government Association, supported by the Faculty Council and Staff Council, the university will establish a consistent **visitation policy** in university-owned housing along with an enforcement of current on-campus tobacco policy with plans for a tobacco free campus.

Academic excellence among the NCAA student athletes was recognized with 58 student-athletes having completed their degrees, 21 student-athletes recognized for academic excellence with a 4.0 GPA, and 107 student-athletes recognized for academic achievement with a 3.5 GPA or higher.

The Gallup Organization study provided several "points of pride" for the university system, compared to national or other private university data with respect to alumni working full-time, engaged at work, and thriving in five elements of well-being. The study also "pointed to opportunities" for the university system related to the **Student Experience** with respect to emotional attachment to the alma mater, preparing students for life after college, and the importance of a professor who cared about them as a person.

### COMMUNITY RELATIONS AND BUILDING THE BRAND

During the last year, the president was involved with the Commerce Bank St. Charles/North Group Advisory Board, FBI Citizens Academy, Greater St. Charles County Chamber of Commerce and Leadership Council, St. Charles County Economic Development Council Board of Directors, St. Charles County Partners for Progress Board of Directors, St. Louis Regional Chamber Board of Directors, St. Louis Regional Sports Commission Board of Directors, and facilitated a **Strengths-Based Leadership** professional development program for the City of St. Charles.

## LAST 12 MONTHS

During the last year, the president participated in the GALLUP **Presidential Priorities Podcast** discussing the results of the Gallup survey, discussing enhancement to the student experience implemented for next year, and discussing the trends impacting higher education. The president also provided quarterly articles to the local St. Charles **StreetScape Magazine**, *Confluence with Michael Shonrock*.

During the last year, the president participated in and built relationships with professional associations such as the American Council on Education (ACE), the Association of Governing Boards (AGB), the Association of Presbyterian Colleges & Universities (APCU), President's Council, the Council of Independent Colleges (CIC), the Higher Learning Commission (HLC), the Mid-America Intercollegiate Athletics Association (MIAA) CEO Council, the Missouri Colleges Fund, Inc. Board of Directors, and the National Collegiate Athletics Association (NCAA).

The leadership team lead by the marketing department worked with Geile Leon, a marketing and communications company, to begin the process of rebranding the institution. After an assessment, two needs became evident: a clean and cohesive look, and an effective tagline. Geile Leon's "distilled thinking" strategy produced a roadmap that led to the conceiving of three separate "looks" and five potential taglines for evaluation. The separate visual identities and taglines were reviewed by numerous internal constituent groups, including the board of directors, cabinet and council, faculty and staff, students, etc. In addition, external focus groups were conducted. Feedback from all of these groups guided the selection of Lindenwood's **LIKE NO OTHER** tagline, and our new visual identity, marked by a distinct gold or maroon slant on billboards, admissions vehicles, safety and security vehicles, mail delivery, advertising materials, business cards, stationary, parking stickers, ID cards, etc. Lindenwood University's Marketing department received the **2015 Telly Award** for the **Like No Other** campaign.

Further elevating the university's visibility and recognition, the NCAA student athletic teams finished 29th among 300 schools in the Division II **Director's Cup** and 2nd among 16 schools in the MIAA Conference, with championship designations in Women's Gymnastics, Men's Wrestling, Men's Swimming, and Women's Lacrosse. During the Summer Olympic Games in Rio de Janeiro, Brazil will be hosting five Lindenwood University Olympiads from Synchronized Swimming, Weight Lifting, Skeet Shooting, High Jump, and Triple Jump.

## RAISING FUNDS & FRIENDS

The reorganization of the Development and Alumni Relations Office including the appointment of the new Vice President for Development and Alumni Relations, the new directors of development and fundraising, the new director of alumni relations, and new Raisers Edge training.

The vice president for development and alumni relations implemented accountability for activity and dollars raised for the vice president and the directors of development and fundraising, including team goals of 200 visits per year, 36 proposals per year, and 4,000 phone calls per year as the minimums expected, and updated analytics and alumni database information on the **40,000 alumni** and donor constituents, establishing giving capacities as well as updating contact numbers and addresses.



## LAST 12 MONTHS

The vice president for development and alumni relations established the infrastructure for the **Belleville** campus and their campaign to mirror the St. Charles campaign on goal setting and accountability and began the development of strategies with select board members, deans, and vice presidents for optimizing fund raising for cultivating and soliciting major donor prospects.

The vice president for development and alumni relations is developing opportunities to establish new **alumni clubs** in St. Louis, Kansas City, Chicago, and Dallas and personally reaching out to 1,600 alumni by telephone to reestablish relationships.

Based on a recommendation from a member of the Board of Directors, the president and the vice president for development and alumni relations established the new **iDonate** online giving solution for non-cash gifts resulting in new revenue for the university system.

Based on a recommendation from a member of the Board of Directors, the president and the vice president for development and alumni relations have received **100% support** from members of the Board of Directors and 73% support from faculty and staff for the LARC campaign.

### LIKE NO OTHER

The provost and vice president for academic affairs and vice president for human resources conducted the first-ever **Faculty Performance Evaluation** process for the Spring 2016 academic school year.

The vice president for human resources developed the first-ever **Job Descriptions** for faculty and administrative staff and utilized the CBIZ Job Classification System to develop the first-ever Salary Ranges (minimum, midpoint, maximum) for university employees.

**Hear Us Roar**, a new bi-monthly online electronic newsletter, was created and distributed to members of the Board of Directors and members of the President's Council including some 1,000 highlights of the Lindenwood University System.

The vice president for human resources Initiated the first-ever mandatory online training for full time employees through **SafeColleges**, including sexual harassment, Discrimination Awareness in the Workplace, Clery Act Overview, and Workplace Bullying: Awareness and Prevention.

The president provided first-ever **Professional Development** opportunities for the Leadership Team and other senior leadership in the areas of Strengths-Based Leadership, Adaptive Leadership, and attendance at professional association meetings (e.g., HLC, NACUBO, Workday).

The **Board of Directors** Athletics Committee Chair J. Michael Conoyer attended the annual meeting of the National Collegiate Athletics Association (NCAA) and **Board of Directors** Committee Member Patricia Penkoske attended the annual meeting of the Higher Learning Commission (HLC).

The president, along with the general counsel, amended the partnership agreement between Lindenwood University (St. Charles) and St. Charles County Community College related to the shared Nursing & Allied Health facility.

The president's professional development included the Council of Independent Colleges President's Institute, the Federal Bureau of Investigation St. Louis Division Citizens Academy, and WHY Discovery Workshop.

During the last year, the **Lindenwood House** hosted numerous receptions for student-athletes and registered student organizations recognizing individual and organizational accomplishments. Michael and Karen Shonrock became members of the Linden Grove Society, Butler Society as Butler Associates, and supporters of Lindenwood University Athletics.



## NEXT 12 MONTHS

The Opportunities and Expectations for Leadership in **The Leadership Profile for the 22nd President of Lindenwood University** noted the importance of continuing strong financial management and entrepreneurial program development, supporting academic excellence and student focus, developing community relations and building the brand, and raising funds to support Lindenwood's goals.

The following strategies highlight future **opportunities** for **accomplishment** for the leadership team during the 2016-2017 academic school year:

### PLANNING

During the 2016-2017 academic school year, the leadership team will provide leadership for a new **strategic plan** including: developing a current state analysis (with mission, vision, values, environmental scan, SWOT analysis, and market analysis), building a strategic foundation (with a summary of current state analysis, identifying strategic opportunities, and formulation of a strategic planning team), developing a new strategic plan (developing strategic goals, identifying strategic initiatives, drafting a strategic plan, and developing monitoring tools), and launch a new strategic plan (while monitoring goals and initiatives).

The leadership team will review the Council of Independent Council's KIT or **Key Indicators Tool** to improve the capacity of the university system to access and utilize data enhancing and improving institutional effectiveness in the areas of student enrollment and progression, faculty, tuition revenue and financial aid, and financial resources and expenditures. The president and vice president for financial affairs and chief financial officer will also review the RubinBrown annual financial audit which provides financial ratio analysis compared to selected peer institutions (e.g., reserve, net operating, return on net assets, viability, and composite score).

The leadership team will consider the adoption of the **Balanced Scorecard** used for strategic planning and management of alignment of university system activities to vision and strategy, to improve internal and external communications, and to monitor the university system performance against strategic goals.

The president, the vice president for enrollment management, and the leadership team will begin the Strategic Enrollment Planning process, initially identifying **Key Performance Indicators** (KPIs) for the Lindenwood University System.

### FINANCIAL MANAGEMENT AND ENTREPRENEURIAL PROGRAMS

The president, the vice president for financial affairs and chief financial officer, and the leadership team will review the Council of Independent Council's FIT or **Financial Indicators Tool** (based on KPMG's CFI or Composite Financial Index) related to resource sufficiency, operating results, financial assets, and debt management (e.g., new construction) for the Lindenwood University System.

The vice president for information technology and chief information officer, and the vice president for financial affairs and chief financial officer will begin implementation of **Workday Financial Management** (e.g., timely reports, analytic data, real-time access) for the university system.

The vice president for intercollegiate athletics will establish a partnership with **Vivature** providing a software and billing solution for athletics training and providing revenue to the Intercollegiate Athletics and Athletics Training programs.

## NEXT 12 MONTHS

### ACADEMIC EXCELLENCE AND STUDENT FOCUS

The president, the provost and vice president for academic affairs, and the leadership team have begun preparations for the **Higher Learning Commission (HLC)** campus visit scheduled for **November 6-8, 2017**, addressing 'met with concerns' identified from Lindenwood University's 2013 Comprehensive Evaluation with the Interim Report filed on July 1, 2015. The Embedded Monitoring Report on assessment will be included with the university's Assurance Argument on November 6, 2017.

The provost and vice president for academic affairs, the vice president for student development, and the leadership team will undertake consolidation of the **First Year Experience** program and the Student Academic Services office to enhance academic advising and academic support services for new freshman (e.g. retention).

The vice president for information technology and chief information officer, and the vice president for enrollment management will begin implementation of **Workday Student Information** for the university system.

With the completion of the Library and Academic Resources Center, additional instructional classrooms and seminar rooms will be provided, as well as consolidation of a number of academic and student support programs and services.



### COMMUNITY RELATIONS AND BUILDING THE BRAND

During 2016-2017, a new **President's Community Advisory Council** shall be established.

The president will have continued engagement with the following community organizations: FBI Citizens Academy St. Louis Division Alumni Association, Greater St. Charles County Chamber of Commerce Leadership Council, St. Charles County Economic Development Council Board of Directors, St. Charles County Partners for Progress Board of Directors, St. Louis Regional Chamber Board of Directors, Commerce Bank St. Charles/North Group Advisory Board Chairperson, and Council for the Advancement and Support of Education.

The leadership team will continue the Lindenwood **LIKE NO OTHER branding campaign** for the university system.

The vice president for intercollegiate athletics is launching **Under Armour** as the official athletic apparel partner for the university system.

The vice president for information technology and chief information officer will launch the **Fastspot** state-of-the-art newly designed **website** for the university system.



### RAISING FUNDS & FRIENDS

The vice president for development and alumni relations will proceed with the establishment of the **President's Circle**.

The vice president for development and alumni relations will continue state/regional/national outreach to alumni and friends along with recommended new alumni chapters and alumni clubs established in partnership with the Alumni Association.

The campus president and the vice president for development and alumni relations will launch a first-ever fundraising campaign and re-establish the alumni chapter for the **Belleville** campus.

## NEXT 12 MONTHS

The vice president for development and alumni relations and the director of alumni relations will be sponsoring a first-ever **Shades of Ireland 2018** President's Tour for alumni and friends.

The vice president for development and alumni relations and the director of alumni relations will be launching the new **LIKE NO OTHER** affinity **VISA** credit card for alumni and friends.

At the direction of the president, the vice president for development and alumni relations will review the JF Smith Group draft recommendations related to naming rights, a naming guideline policy, and a gift acceptance policy with the Board of Director's **Fundraising & Development Committee**.

### LIKE NO OTHER

The Office of the President will launch the **Director's Desk**, a new portal for the Board of Directors meetings, and **Board Effect**, a new online resource for the Board of Directors meetings.

The system president, the campus president, the provost and vice president for academic affairs, and the general counsel will finalize the partnership agreements with **SSM Health** supporting academic programs (the new School of Health Services) and athletic programs (St. Charles and Belleville campuses).

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**LIVING ALUMNI**

The president will discuss with the Board of Directors **strategic issues** facing colleges and universities: the business model, the partnership imperative, the value proposition, student success and completion, the academic workplace, diversity and inclusion, campus safety, and the changing environment for higher education.

The vice president for human resources will finalize the new **Employee Guidebook** (pending Board of Directors approval), consolidating former Faculty and Staff Guidebooks and Handbooks, and providing alignment and consistency with respect to university system processes and policies.

The vice president for human resources will conduct the first-ever **Staff Performance Evaluation** process for the Spring 2017 academic school year.

The system president will be in the classroom and begin teaching, along with members of the leadership team, a LUL **Freshman Experience** course during the Fall semester.

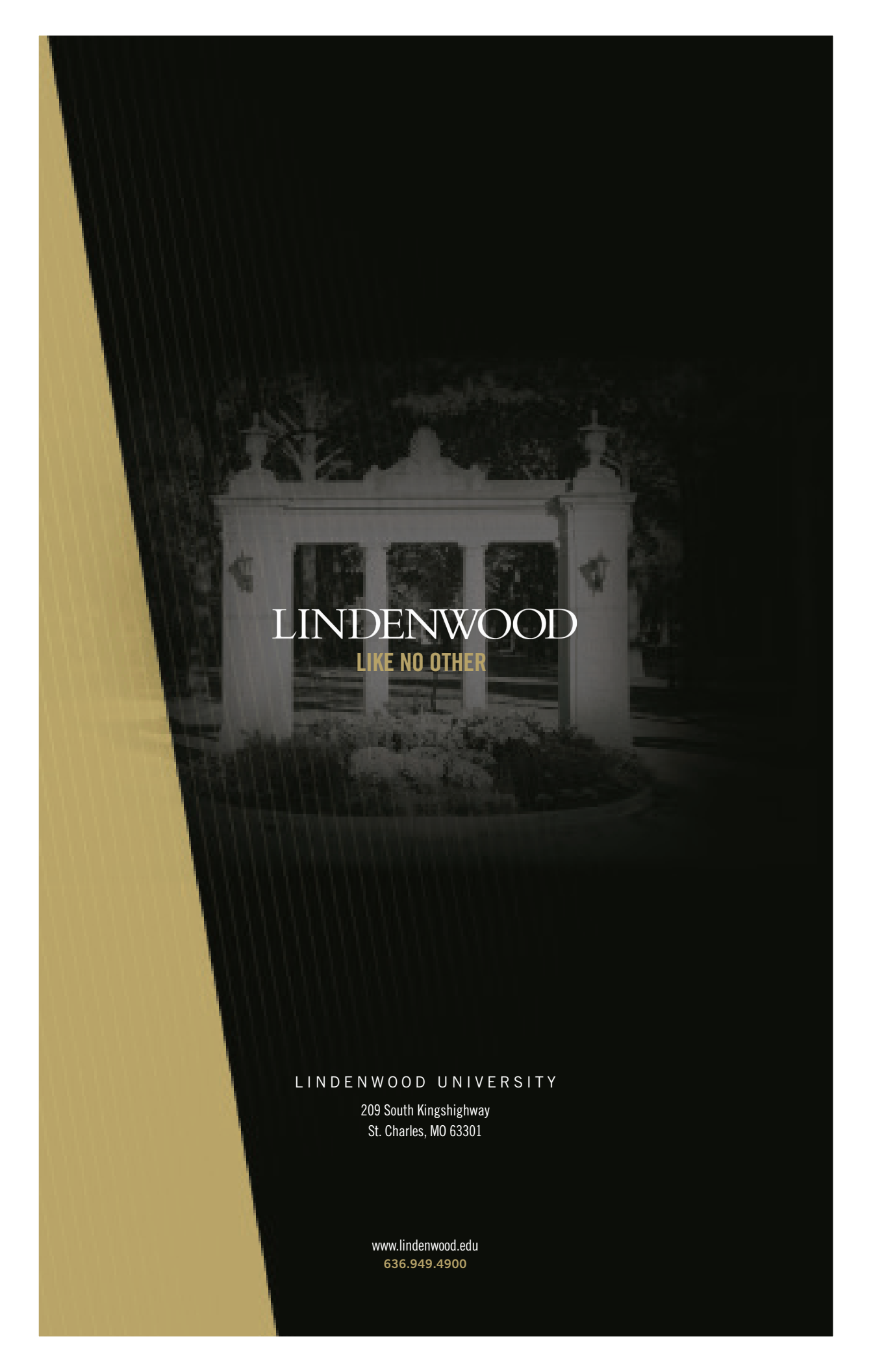
As requested by the Faculty Council and supported by the Staff Council and Lindenwood Student Government, the establishment of a **President's Advisory Council** for Diversity, Equity, and Inclusion will be facilitated by Campus President Brett Barger and System President Michael Shonrock.

**Board of Directors** Committee Member Patricia Penkoske, Associate Vice President David Wilson, and President Michael Shonrock will present at the Higher Learning Commission (HLC) annual meeting.

### TAKE AWAY

The Kansas Leadership Center notes that leadership is an activity, not a position. Anyone can lead, anytime, anywhere. It starts with you and must engage others. Your purpose must be clear. It's risky. Often leadership starts with a question. Leadership competencies include how to **diagnose a situation**, how to **energize others**, how to **manage self**, and how to **intervene skillfully**.





LINDENWOOD  
LIKE NO OTHER

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