

5.C - Core Component 5.C

The institution engages in systematic and integrated planning.

1. The institution allocates its resources in alignment with its mission and priorities. 2. The institution links its processes for assessment of student learning, evaluation of operations, planning, and budgeting. 3. The planning process encompasses the institution as a whole and considers the perspectives of internal and external constituent groups. 4. The institution plans on the basis of a sound understanding of its current capacity. Institutional plans anticipate the possible impact of fluctuations in the institution's sources of revenue, such as enrollment, the economy, and state support. 5. Institutional planning anticipates emerging factors, such as technology, demographic shifts, and globalization.

Rating

Met With Concerns

Rationale

Wright State University provided evidence that it allocates its resources in alignment with its mission and priorities. WSU provided evidence that it prioritizes academics and the student experience in its budgeting and expenditures. Enrollment had been negatively impacted, losing 1,136 students from Fall 2017 to Fall 2018. The university assessed the challenge and responded with an enrollment plan. As part of an Interim Monitoring process in 2019, WSU developed an enrollment plan which included increasing enrollment in three areas: (1) direct enrollment from high school; (2) transfer students; and (3) Fall-to-Fall retention (from 64% to 68%). The plan also entailed introducing new academic programs and delivery models and an aggressive marketing plan to strengthen the University's identity.

There is evidence that Wright State University links its processes for assessment of student learning, evaluation of operations, planning, and budgeting. WSU recognized it had a lower retention rate than the goal in its enrollment plan. Fall-to-Fall retention had been 64%, but the university set a goal of 68% retention. To that end, there is evidence that it has invested in five Academic Success Centers to encourage growth in student success and retention. These Centers include the Math Learning Center, the University Writing Center, Tutoring Services, the Student Retention Team, and an office for Supplemental Instruction. In addition, many academic departments provide Academic

Help Rooms, and the university provides frequent "Research Toolkit Workshops" for students to hone their research skills.

Evidence that Wright State University engages in a planning process that encompasses the institution as a whole and considers the perspectives of internal and external constituent groups is incomplete. Evidence was provided in the self-study that WSU had been engaging in a broad-based strategic planning process until mid-October of 2018, this plan was never brought to completion. WSU's Strategic Planning website still has prospective language: "Wright State University's strategic

Wright State University - OH - Final Report - Exported on 8/17/2020

Page 45

planning process WILL guide the university ..." [emphasis added], and the most recent posting to this website is dated 31 October 2018. Similarly, WSU's "Strategic Planning Documents and Resources" website has no entries more recent than a Draft Strategy Document dated 18 October 2018. There is ample evidence that up until that date, WSU's planning process was broad and inclusive of internal and external constituents. Given the lack of evidence that this process came to fruition, this level of shared governance and consultation unfortunately had no result. The institution states in its selfstudy that this delay was due to the change in leadership. The delay has lasted nearly two years and there is no evidence at this time of a plan to re-start the strategic planning process during Fall 2020. Wright State provided evidence that it conducts its planning using the a sound understanding of its current capacity, anticipating the possible impact of fluctuations in its sources of revenue. WSU's Office of Institutional Research and Effectiveness ("IR") provides regular Enrollment Reports for the institution to monitor its capacity to serve students effectively. IR also tracks demographic data to provide long-term trend data. IR data are accessible to all WSU faculty, allowing tracking at the institutional, college, departmental, and course levels. Evidence is provided that IR staff members work with academic and non-academic units to enable future planning and academic program review based on the data. The State of Ohio's Department of Education has a funding model that informs how resources are distributed and how WSU should plan. As Wright State's enrollment has declined, its share of these resources has also declined.

The COVID-19 pandemic has affected planning and capacity at Wright State just as it has throughout higher education, including unpredicted effects on the FY20 and FY21 budgets. For example, the negative effect of COVID-19 on WSU's allocation of Ohio's FY2020 budget allocation

was \$3,800,000. During the summer of 2020, the WSU Faculty Senate Executive Committee conducted a well-attended (300+ participants) meeting with the President and Provost to discuss the financial effects of COVID-19 on the FY21 budget. 400 faculty members completed a survey asking them about Fall 2020 planning. Evidence was provided that the Student Government Association (“SGA”) was supportive of this initiative. In fact, SGA passed a resolution in support of the approach WSU has taken. Wright State University's 2018 draft Strategic Plan has not been enacted. The draft demonstrates

that the institution's planning processes anticipate emerging factors, such as technology, demographic shifts, and globalization. For example, the 2018 draft of “Strategic Plan 2025”

identified the following goals and objectives: In terms of “Collaborative Delivery of Services,” the goals included: Redesign the transfer student experience; and Strengthen the system for proactively identifying students in need of assistance. In terms of “Research, Innovation, and Entrepreneurship,” the goals included: Strengthen and elevate the research enterprise; and Establish a Center for Innovation and Entrepreneurship. In terms of “Strategic Relationships and Partnerships,” the goals included: Establish an Office of Corporate and Community Engagement; and Institutionalize best practices for globalization and education abroad. In terms of “Student Life and Engagement,” the goals included: Establish the President’s Council on Diversity and Inclusion; and Allyship training. In terms of “Teaching, Learning, and Programming,” the goals included: Expand online offerings; and Establish Wright State’s experiential learning guarantee. Finally, in terms of “Strategic Foundations,” the goals included: Create an integrated health-focused college; Implement the fiscal sustainability plan; and Update the campus master plan. These goals clearly demonstrate a desire to anticipate emerging factors related to technology, demography, and globalization, but unfortunately this strategic plan was never officially enacted, remaining in draft form on the institution’s website since October 2018.

Wright State University - OH - Final Report - Exported on 8/17/2020

Page 46

Evidence also demonstrates that enrollment planning is tied to local demographic changes through coordination with regional community colleges, such as through WSU's Community College Partnership Program website which provides specific pathways for students transferring from

Cincinnati State Technical and Community College, Clark State Community College, Edison State Community College, Sinclair College, and Southern State Community College.

Interim Monitoring (if applicable)

The team requests an interim monitoring report to be due August 31, 2021. Since WSU has been operating under a strategic plan that was to expire in 2018, and did not indicate any plan or commitment to completing or initiating a strategic planning process, a monitoring report is being requested by the end of August 31, 2021. Continuing into another calendar year without a strategic plan leaves the university in lack of clear priorities for the future where uncertainty is already high and challenges will continue. The report should provide evidence and analysis on three topics:

1. Evidence that a strategic planning process has been restarted, or that the draft strategic plan has been implemented;
2. Evidence and analysis of what Wright State University has been using to guide its decision making in the absence of a formal strategic plan; and
3. Evidence of a schedule for the completion of a strategic planning process moving forward.

Wright State University - OH - Final Report - Exported on 8/17/2020

Page 47

5.D - Core Component 5.D

The institution works systematically to improve its performance.

1. The institution develops and documents evidence of performance in its operations.
2. The institution learns from its operational experience and applies that learning to improve its institutional effectiveness, capabilities, and sustainability, overall and in its component parts.

Rating

Met

Rationale

Wright State University provided documentation that it develops and documents evidence of performance in its operations. For example, WSU participates in the statewide Efficiency Advisory Committee, established by the Chancellor of the higher education system in Ohio. This process allows WSU to benchmark its efforts to capture efficiencies against other higher education institutions in Ohio. The annual report of the Efficiency Advisory Committee measures such

dimensions of efficiency as Operational Efficiencies, Partnerships, Academic Practices, Time to Degree, and Policy Reform. The 2019 Report cites the efficiencies captured by Wright State's leadership of the Western Ohio Regional Compact. The 2018 Report mentions Wright State's participation in a multi-institution Master Services Agreement with Ellucian, that resulted in savings of \$4,200,000 over five years at the five universities. A State of Ohio reporting requirement called "Senate Bill 6" requires institutions of higher education to report their CFI scores on a quarterly basis. For now, GASB 68 accounting standards are excluded in the CFI calculations for all Ohio institutions.

There is evidence that WSU learns from its operational experience and applies that learning to improve its institutional effectiveness, capabilities, and sustainability, overall and in its component parts. Wright State uses a variety of reports to ensure its effectiveness and sustainability, including an annual Affordability and Efficiency Report, monthly Finance Committee reports, and frequent enrollment and retention reports from its Office of Institutional Research and Institutional Effectiveness. Samples of these reports were readily available. Discussions about future financial sustainability from FY2021 into the future are broadly inclusive of the entire campus as evidenced by minutes of the Faculty Senate, Finance Committee, Student Government Association, and other shared governance structures. Future budget reductions will be substantial, variously modeled on the order of \$30,000,000 to \$50,000,000 due to the drops in enrollment and reductions in WSU's of the statewide allocation model. Among the budget reduction ideas are the restructuring of academic units and reductions in staffing and athletic programs. Specific examples were provided of budget reduction strategies including changes in its copier and printer vendor and a renegotiation of WSU's contract with its food service vendor (Chartwells).

Interim Monitoring (if applicable)

Wright State University - OH - Final Report - Exported on 8/17/2020

P