engage west!

Leadership Development Institute

Connect. Transform. Succeed.

President Kyle Marrero
May 8, 2015

Focus on

Communicating the "Why"
Leadership Development Institutes: Purpose, Goals, Outcomes!

• Constant and Reliable Communication/Messaging

• Specific, Focused Training and Development of Leaders

• Building Community Across Divisions - Aligning Strategies/Arrows within a Framework

• Model/Demonstrate Best Practices - Assess and Validate Processes

• Celebrate Successes
Engage West Year One: LEARNING!
(Building the toolkit)

• Workshops, presentations, strategic planning, goal setting and assessment strategies, difficult dialogues, effective communication, evaluation processes, linkage assignments

• Golden Personality Test - Self Reflection and Individual Leadership Development Plans

• Engage West! Engagement Survey and Rollout - Action Plans
Engage West Year Two: LIVING! (Using the tools)

- Continuing leadership development - individual and managerial

- Unifying Strategic Planning, Goal Setting and Assessment into a Continuous Improvement Cycle

- Validation and Accountability...holding each other accountable

- Modeling Success

- NEXT STEPS: Engaging Faculty and Staff with Engage West!
Engage West Year Two: Engaging Faculty & Staff

Current tools to use:

• Survey Rollout/Action Plans

• Annual Evaluation Processes with Merit/Retention Funding

• Golden Personality Test - available in groups of 5…up to 100

• Best of West Award/Recognition
Engage West Year Two: Engaging Faculty & Staff

Development Retreats/Development Opportunities:

FACULTY - Center for Teaching and Learning/Faculty Senate Development Committee

STAFF - Staff Advisory Council/Human Resources
Engage West Year Three: LEGACY! (Developing New Leaders)

• Still LEARNING and LIVING - continuous improvement cycle inclusive now of faculty and staff

• Still Validation and Accountability and Modeling Success

• NEXT STEPS...the Generative Process of Identifying and Developing New Leaders
Changing Culture to a Culture of High Performance

- Urgency! (check)
- Have a Plan (check)
- Commitment to Transparency (check - still improving)
- Cohesive Organizational Structure (check - still improving)
- Developed & Sustainable Human Capacity (working on it)
- Consistent Development and Training (working on it)
- Commitment to and Practice of Diversity & Inclusion (working on it)
- Validation and Accountability (working on it)
- Reward, Recognition, and Compensation (working on it)
BEST OF THE WEST!
This is the "WHY!!!"
PRESIDENTIAL SCORECARD
Self evaluation and assessment FY15
Adjusted goals for FY16
# SCORECARD

**President – University of West Georgia**

<table>
<thead>
<tr>
<th>Imperative</th>
<th>Measure</th>
<th>Tool</th>
<th>Wgt</th>
<th>Scale</th>
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</thead>
<tbody>
<tr>
<td><strong>Student Success</strong></td>
<td>Retention, Progression, Graduation (2,338 degrees conferred; 70.8% retention rate; 42% 6 yr grad rate)</td>
<td>30, 60, 90 SCH, Degrees Conferred Retention Rate, 6 yr Grad Rate</td>
<td>25%</td>
<td>5 = 2,400; 75%; 44%</td>
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<td>4 = 2,350; 74%; 43%</td>
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<td>3 = 2,300; 73%; 42%</td>
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<td>2 = 2,250; 72.5%; 41.5%</td>
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<td>1 = 2,150; 72%; 41%</td>
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<tr>
<td><strong>Operational Success</strong></td>
<td>Total Enrollment - All sites; All constituencies (11,929; 10,845)</td>
<td>Headcount &amp; FTE</td>
<td>20%</td>
<td>5 = above 12,300; above 11,131</td>
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<td>4 = 12,200-12,300; 11,041</td>
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<td>3 = 12,150-12,200; 11,031</td>
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<td>2 = 12,000-12,150; 10,995</td>
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<td>1 = below 12,000; 10,900</td>
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<tr>
<td><strong>Operational Success</strong></td>
<td>Employee Engagement (People)</td>
<td>75% Engaged</td>
<td>15%</td>
<td>5 = above 4.4</td>
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<td>4 = above 4.3</td>
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<td>3 = 4.2</td>
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<td>2 = 3.8-4.2</td>
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<td>1 = below 3.8</td>
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<tr>
<td><strong>Academic, Operational, Partnership &amp; Student Success</strong></td>
<td>Fundraising</td>
<td>Total Annual Gifts &amp; Pledges; VSE Annual Reporting</td>
<td>15%</td>
<td>5 = Above $7.5M; $3.7M</td>
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<td>4 = $6.5M; $3.3M</td>
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<td>3 = $6M; $3.1M</td>
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<td>2 = $5.5M; $2.8M</td>
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<td>1 = below $5.5M; 2.8M</td>
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<tr>
<td><strong>Academic &amp; Operational Success</strong></td>
<td>Faculty/Staff Median Salary (Fac 85%; Staff 84% pay grades 1-10)</td>
<td>CUPA, Mercer medians</td>
<td>15%</td>
<td>5 = above 90%</td>
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<td>4 = 88-90%</td>
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<td>3 = 85-88%</td>
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<td>2 = 82-84%</td>
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<td>1 = below 82%</td>
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<tr>
<td><strong>Partnership Success</strong></td>
<td>Regional Economic Impact ($442M)</td>
<td>Annual Analysis – Center for Economic and Business Development</td>
<td>10%</td>
<td>5 = above $475 million</td>
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<td>4 = $460 - $475 million</td>
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<td>3 = $450 - $460 million</td>
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<td>2 = $442 - $450 million</td>
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<td>1 = below $442 million</td>
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Scale

5: met super stretch goal

4: met stretch goal

3: met challenging goal

2: stayed the same or some gain but not at goal

1: declined
Student Success

Retention: 74.16%, scale score 4, weight 12%

Results
• 3.36% increase from previous year (70.8%)
• Original goal was 73%

Assessment/Analysis
• Intrusive advising, comprehensive impact of CCG Plan is having impact

Improvement Plan
• Continue efforts; assess and refine current programs
• SSC (EAB) was piloted this spring with full implementation next year - should have additional impact specific to this indicator of student success
• Adjusted goal for FY16 is 76% (1% ahead of original projections)!
Student Success

6-year graduation rate: 41%, scale score 1, weight 10%

Results
• 1% decrease from previous year (42%)
• Original goal was to hold steady at 42%

Assessment/Analysis
• Tracking of 6 year class indicated this decrease would happen
• Still showing upward trajectory in this indicator from 39% two years ago – will see continuous wabbling for two more years

Improvement Plan
• Full implementation of CCG Plan to ensure course mapping and the implementation of SSC will have impact on this indicator
• Continue to monitor future 6 year class progression
• This is an area needing further assessment to target effective actions. **Concerned.**
• **Adjusted goal for FY16 is 42%**
Student Success

Degrees Conferred: 2,256, scale score 2, weight 12%

Results
• 3% decrease from previous year (2,338)
• Original goal was to hold steady at 2,300

Assessment/Analysis
• Tracking of 4 & 6 year classes indicated this decrease
• Still showing upward trajectory from previous years

Improvement Plan
• Full implementation of CCG Plan to ensure course mapping and the implementation of SSC will have impact on this indicator
• Continue to monitor future 4 & 6 year class progressions
• This is an area needing further assessment to target effective actions. Concerned.
• Adjusted goal for FY16 is 2,300
Operational Success

Total Enrollment: 12,206, scale score 4, weight 12%

Results
- 2.3% increase from previous year (11,929)
- “Meet” goal was 12,150-12,200

Assessment/Analysis
- Record headcount for UWG (5th year in a row)
- 1st year of Enrollment Management strategic plan – success in progression increase
- Aligned target markets with recruitment/admissions efforts
- Targeted dual enrollment seeing 150% increase

Improvement Plan
- Continued implementation and assessment of SAEM plan will garner continued success (FTIC, Transfer, Graduate - new targets...Adult, Military, Dual Enrollment)
- Expected continued success with all constituencies
- **Adjusted goal for FY16 is 12,600**
Operational Success

FTE: 11,074, scale score 4, weight 9%

Results
• 2.1% increase from previous year (10,845)
• “Meet” goal was 11,031

Assessment/Analysis
• Record FTE for UWG (5th year in a row) aligned with enrollment growth
• 1st year of Enrollment Management strategic plan – success in progression increase
• Intrusive advising pushing to 15ch per semester

Improvement Plan
• Continued implementation and assessment on progression thresholds will garner continued success
• Adjusted goal for FY16 is 11,300
Operational Success
Survey Mean: 3.8, scale score 2, weight 8%

Results
• The UWG survey mean was identical to last year (3.8)

Assessment/Analysis
• Refined and focused survey developed internally by UWG Research Center - the second year instrument to gauge employee engagement and satisfaction
• Senior Leadership aggregation mean rose from 3.60 to 4.05 indicating improvement in perception of effectiveness of senior leadership
• Also an increase in awareness and alignment with mission/vision

Improvement Plan
• Continued focus on salary, communication and trust should be focus of next academic year
• Survey action plans need to have direct impact on development and environment
• Adjusted mean goal for FY16 is 4.0
Operational & Partnership Success

Fundraising: Gifts and Pledges = $7.8 million (June 30, 2015), scale score of 5, weight 12%

Results
• Second year of record Gifts and Pledges - $7.8 million end of fiscal year (“meet” goal was $6 million)

Assessment/Analysis
• Management and discovery of new prospect (moves management) has been greatly enhanced by wealth screening
• Refined/focused alignment with Strategic Plan Improvement Plan

Improve ment Plan
• Case for Support and Feasibility Study are in process for the institutions first ever comprehensive campaign
• New leadership in the Foundation (COAO) and final stages of VP search
• Activity and will become more heightened and focused as the Case is finalized and campaign approved
• Gift and Pledges goal for FY16 is $7.5 million
Operational & Partnership Success

Fundraising: VSE Annual Reporting = $3.3 million (June 30, 2015), scale score of 4, weight 7.5%

Results
• “Meet” goal was 3.1M

Assessment/Analysis
• Increased projection of VSE (dollars in the door) landed at 3.3 million (scale score of 4) at end of fiscal year
• Management and discovery of new prospect has been greatly enhanced by wealth screening
• New Annual Fund Manager hit record target of 850k

Improvement Plan
• Case for Support and Feasibility Study are in process for the institutions first ever comprehensive campaign
• New leadership in the Foundation (COAO), hiring new VP of Advancement – hiring of Annual Fund Coordinator
• Activity will become more heightened and focused as the Case is finalized and campaign approved
• VSE goal for FY16 is $3.5 million
Academic & Operational Success

Increase Faculty Median Salary (currently 85%) and Staff Salary 100% of entry point of all 19 pay bands, scale score of 3, weight 10%

Results
• Faculty - 85% CUPA median (effective July 1, 2014); 86% (effective July 1, 2015)
• Staff - 100% of entry point of all 19 pay bands (effective July 1, 2014)

Assessment/Analysis
• Historic $2.25M in equity, merit and retention raises to faculty and staff
• Have committed to $1.4M in equity, merit and retention raises to faculty and staff for July 1, 2015

Improvement Plan
• CUPA median will be revised for market increases in Spring of 2016 with a continued mulityear goal of achieving 100% of the median
• Revised market study for pay band entry points will be also updated in Spring of 2016 with a continued commitment to maintaining the market adjusted entry point for all 19 pay bands
• Adjusted goal: Faculty – 87-90% of the new market analysis for FY17; 100% of staff at new market analysis for FY17
Partnership Success

Annual Economic Impact - $456 million, scale score of 3, weight 7.5%

Results
• Increase of $14 million from previous year

Assessment/Analysis
• Historic annual economic impact with continued student growth, employee FTE growth, facility construction, maintenance and repairs
• Strategic Partnerships with healthcare, business and technology

Improvement Plan
• The opening of the Newnan Center, continued growth, and 43 new FTEs - annual economic impact should continue to grow
• Strategic partnerships will result in heightened impact
• Adjusted goal of $468 million for FY16
Presidential 2015 Score

5: met super stretch goal
4: met stretch goal
3: met challenging goal
2: stayed the same or some gain but not at goal
1: declined

3.54 (met challenging goal)
Focusing on the “Why”

• Transparency & Accountability
• Modeling Goal Setting (based on data measurements - KPIs), Assessment and Improvement Plans
• Most importantly…these are goals that cannot be reached without your help!
FY 2016 LDI Dates

Thursday, August 13, 2015

Friday, November 6, 2015

Friday, February 12, 2016

Thursday & Friday, May 5 & 6, 2016