



# Journey Forward Together

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## A Strategic Plan for Wheeling University

2020 – 2024

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# WHEELING UNIVERSITY

To the Wheeling University Community:

It is my pleasure to present the Wheeling University strategic plan as part of the *Journey Forward Together*. The 2020-2024 Strategic Plan builds from the previous plan with a keen eye toward revitalization of former Wheeling Jesuit University as Wheeling University, West Virginia's only campus-based Catholic higher education institution. Monitoring the implementation and assessing the outcomes with measurable goals will ensure our University's success in meeting our strategic plan.

During the 2019 calendar year, WU initiated its strategic planning process utilizing and combining resources currently available such as our Five-Year Financial Sustainability Plan, prior Strategic Plans, our most recent Mission Priority Examen, and the Declaration of Shared Purpose, resulting in our aspirational journey. We looked honestly at our history, core strengths, situational assessments, challenges and opportunities. Through it, we re-affirmed our mission, developed our 2024 Vision and outlined the roadmap to achieve it: *Journey Forward Together* and its four strategic initiatives.

The strategic planning effort has turned out to be an excellent process for building unity within the University regarding our vision and future. We come away from this strategic planning process with a roadmap and a working document that sets high, achievable expectations and allows everyone to be joined on the same path forward that will take Wheeling University to new heights of success.

Our academic programs of study are exceptional and the Catholic identity of our institution is flourishing. The University can point to solid academic learning outcomes, an applied professional focus, and consistency in applying our mission to our work. The strategic plan builds on this strong foundation.

Higher education institutions throughout the country, especially small- and medium-sized private colleges, are facing financial challenges because of their inability to depend on tuition as their primary economic engine in delivering education. Virtually all institutions rely on external funding, such as the stock market for endowment contributions, annual fund gifts and other external sources of support. In economically challenging times, these external funding sources become unreliable.

The challenges facing Wheeling University are no different from those facing many others and, as a young university with a modest endowment and small alumni base, we are particularly susceptible to economic shifts. We have used this strategic planning process as

a way of thinking differently about our circumstances and how we might transform the institution beyond incremental improvements. We have set the bar high for our future knowing that it will require new types of aspirational thinking.

To truly revitalize the University, we have established a primary objective of fully self-funding our educational operations from tuition, room, board and auxiliary revenues by 2024. This is an ambitious goal for any institution. Achieving self-funding will allow us to operate indefinitely while using our annual fund and other external sources of support for strategic purposes. It will afford us the luxury of investing the gifts of our generous benefactors fully into the future growth of the institution.

The story of Wheeling University over the next five years will be a journey where all aspects of the institution including people, programs and processes experience significant movement forward in quality, execution and growth—all while enhancing our Catholic mission. It is our hope that this work of intentional reflection on mission might guide and inspire the shape of what is to come, for the good of our region, our students, and the greater glory of God.

Wheeling University will continue our tradition as a Catholic university, measuring its success by how and whom it educates and serves. We recognize that, now more than ever, quality U.S. higher education must be affordable and accessible, and must benefit the public good. This strategic plan is a living document that will be used as the compass for our journey. I am pleased to report that progress is already being made on our strategic initiatives and objectives. We look forward to an exciting journey to new heights of success for Wheeling University.



Ginny R. Favede  
President

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## EXECUTIVE SUMMARY

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Wheeling University is embarking upon a journey forward that over the next five years will revitalize the institution while enhancing its Catholic mission. We have established a primary goal of fully self-funding our educational operations from tuition, room, board and auxiliary revenues by 2024. This is an ambitious goal for any institution. Achieving self-funding will allow us to operate indefinitely while using our annual fund and other external sources of support for strategic purposes. It will afford us the luxury of investing the gifts of our generous benefactors fully into the future growth of the institution.

Our 2024 vision is aspirational, exciting and built upon four key initiatives:

**I. We provide our students with a vibrant and distinctive educational experience**, rich in co-curricular activities and opportunities for participation in scholarly research. This initiative recognizes our most important responsibility as a University to provide for the intellectual, social and spiritual growth of our students and position them for success in career and life.

- All students will benefit from diverse learning and social experiences outside the classroom involving, most importantly community service, along with activities such as student clubs, revitalized fine and performing arts, athletics, worship, and retreats. Their endeavors will be tracked with co-curricular transcripts.
- Wheeling University, with programs grounded in the liberal arts and sciences and professional specializations, strives to be a leader among other institutions in facilitating internships and career opportunities for students—outcomes of increasing importance in the ongoing national dialog about the value of higher education. Our comprehensive career services will work to place all graduates within six months of graduation.
- Finally, our facilities will be revitalized. Our growth requires both refurbishment and new construction, providing potential opportunities for collaboration with the Wheeling Community.

**II. We operate five successful areas of study: Arts, Sciences & Theology; Business; Engineering & Construction Management; Education; and Health & Allied Sciences** which collectively enroll over 1,200 (1,100 FTE) students and provide unparalleled learning outcomes. This initiative marks a major step on our journey moving from our existing small-college structure to the funding and revitalization of five distinctive areas of study. While none of these academic areas are new for us, the operation and

marketing of individual areas will provide educational value tailored more specifically to the needs of each discipline.

- The addition of new, high-impact academic programs will allow each area of study to capitalize on market opportunities. We will broaden our recruiting efforts beyond the northern Ohio Valley to the Mid-Atlantic area, Michigan, Indiana and Massachusetts, taking advantage of our strong value proposition that boasts exceptionally well-rounded graduates, strong pass rates on national board exams and high acceptance rates into law and medical schools.
- Funding the new areas will provide compelling opportunities for donors to become engaged with us in their personal areas of interest. WU has embarked upon a Let Your Light Shine capital campaign with a goal of securing twenty-five million dollars over five years. One vitally important constituency is our alumni, whom we plan to re-engage in our new vision through their financial support at participation rates exceeding that of other Catholic Universities in the U.S.

**III. There is global awareness of Wheeling University**, with our campus student body representing more than 15 countries outside of the U.S. We are committed to widening our focus in recognition of the new opportunities and imperatives the increasing interconnectedness of the global community requires of our graduates.

- We aspire to significant growth in enrollment of students originating from outside the U.S., representing a wide variety of countries and regions of the world; these students see WU as an institution offering an excellent education, a welcoming community and the support they need to succeed.
- We will provide a campus community infused with global flavor and opportunities for cross-cultural interaction among our increasingly diverse student body. Our curriculum will promote understanding of the world from an international perspective. Many more of our graduates will gain fluency in languages and study abroad. Over time, there will be a growing awareness among prospective students worldwide that WU is among the leaders in providing a global experience and education.

**IV. We achieve operational excellence in all that we do** by empowering staff, administrators and faculty to strive for continuous improvement in meeting the needs of our students, parents, alumni, donors and other constituents. We emphasize teamwork, problem solving and judicious use of technology in pursuit of high-quality outcomes.

- We will improve processes to consistently achieve high levels of performance, increasing customer satisfaction, reducing costs and building employee engagement. We will address training issues and develop a multi-year technology

## WHEELING UNIVERSITY

roadmap. We are focused on financial sustainability in order to offer fulfilling employment to those in the region.

- We will nurture a culture of performance, respect and cooperation among our people in the Catholic tradition of *cura personalis* (care and respect for each person). They will be engaged in their jobs and feel rewarded for their contributions. We will implement a University-wide performance management system that provides a structured means of establishing expectations, evaluating and rewarding performance and guiding employees to develop in their roles. Our employees accept a culture of innovation and resourcefulness to continually improve and operate within its means.



## UNIVERSITY MISSION

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**Life.** The Catholic traditions of educational excellence and service to others guide all of the programs at Wheeling University. By integrating learning, research and economic development with classical knowledge and Christian revelation, the University seeks to foster competence, creativity and innovation throughout and beyond the campus community. Graduates of the University enter the world of work with socially responsible goals, a lifelong appetite for learning and the desire to make our universe a better place.

**Leadership.** To model the Catholic concern for regional and global neighbors, the University welcomes people of all creeds, races and nationalities to share in the intelligent pursuit of excellence. The University promotes close student-faculty contacts and encourages students to develop their full potential for leadership. Through a grounding in the liberal arts and, above all, example of Jesus Christ, the University endeavors to produce intelligent, moral leaders who will champion the Catholic values of faith, peace and justice. Wheeling University envisions a dynamic leadership role for the University in the lives of its students and in the world at large.

**Service With & Among Others.** In its faculty and students, its research and outreach, the University is national and international. Yet as the only Catholic institution of higher learning in West Virginia, Wheeling University also values its distinctive mission to the immediate area, educating local men and women and returning them to enrich their own communities. Wheeling University firmly believes its graduates will enter the professional world prepared to use their God-given talents not solely for personal fulfillment but as men and women in service to others.

## SETTING THE CONTEXT

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Wheeling University operates within the context of broader macro forces (political, economic, social, technological) and a competitive environment which give rise to opportunities and challenges. Against these we must match our core strengths and mitigate our shortcomings. As we assessed our circumstances during this planning process, we identified a set of strategic priority issues that will be crucial to the future of the University and are addressed by the strategy described in this plan. These priority issues frame our strategic context:

### Strategic Priority Issues

- **Providing excellent student learning outcomes.** The focus of higher education public policy and accreditation is increasingly shifting to student learning outcomes, skills competencies & certification and job placement. This is a traditional area of strength for Catholic institutions and WU in particular as the only campus-based Catholic University in West Virginia. Our outstanding faculty is recognized for its teaching, research, service and robust one-on-one mentorship of our students. We can boast of exceptionally well-rounded graduates who routinely achieve strong pass rates on national board exams and extremely high acceptance rates into law and medical schools. We must remain at the forefront with continuous outcomes assessment across all programs of study, and further enhancements to our career services to ensure that all graduates quickly find meaningful employment.

- **Building on the technological innovation of our academic programs.** The University has evolved in using technology to deliver education. We were a regional pioneer in establishing a convenient, online nursing curriculum allowing practicing RNs to progress to a bachelor's or master's degree level. We will build on our technological innovation in online delivery methods by now having faculty that are certified in online delivery methods through innovative management learning systems and can now move other academic programs online that might excel under that delivery format.

- **Creating a vibrant student experience in Wheeling, WV.** Our Wheeling location, with its safe, small community atmosphere and convenient access to I-70, brings many benefits. Local students feel comfortable here; some choose us primarily for this attribute. Local students who could easily return home on weekends will choose not to when we lay the groundwork for an active campus social life. We must enhance our co-curricular activities, spiritual development opportunities, athletic programming and collaboration with the local Wheeling community.

## JOURNEY FORWARD TOGETHER

- **Self-funding our educational operations.** Wheeling University, like most other small, young institutions, does not enjoy the advantages that a long history can provide in abundant endowments and generous alumni support. Instead, we have excelled at attracting research programs that helped offset our overhead through indirect cost recovery. Now, with reductions in federal earmarks, and pressured federal and state budgets, these funds are less plentiful. Therefore, we must re-energize our core economic engine of delivering education, increasing enrollment to a self-supporting level of over 1,200 (1,100 FTE) students.

- **Increasing awareness of our brand and value proposition.** Wheeling University offers an outstanding value proposition: our impressive acceptance rates into medical and law schools, our strong pass rates on national board exams, and our work placement opportunities, all of which contribute to our outstanding regional ranking in *U.S. News*. We must increase awareness about these successes at Wheeling University.

- **Expanding our reach for students beyond the local market.** Our local higher education market is marked by increasing competition for a shrinking pool of college-bound students in the northern Ohio Valley area of West Virginia, Ohio and Pennsylvania where prospects often opt for lower cost public alternatives. Yet in east coast markets, our pricing is viewed as a relative bargain for the value we deliver. We must capitalize on the opportunities this presents for growth, widening our recruiting efforts to prospects in other areas of the country and world that seek a high-quality Catholic education.

- **Fortifying internal operations to support growth.** WU's operating practices and processes must make it easy for students, families and other members of the University community to do business with us. Achieving the high standards to which we aspire requires continuous improvement in processes, technology and training. Attracting, rewarding and retaining a strong, capable workforce will be of vital importance in our transformational journey.

## VISION 2024

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**We provide our students with a vibrant and distinctive educational experience**

- Our student retention rate is the envy of other institutions
- 100 percent of our residential students participate in co-curricular activities including athletics, fine & performing arts, campus ministry, clubs and community service
- We are a leader in providing exciting internships and career placement opportunities
- Our community partnerships revitalize both Wheeling and the University

**We operate five successful areas of study: Arts, Sciences, & Theology; Business; Engineering & Construction Management; Education; and Health & Allied Sciences**

- Our educational operations are self-funding
- Our enrollment is over 1,200 (1,100 FTE) students
- Our learning outcomes positioned for national accreditation are viewed as a model for higher education and reflect our Catholic identity
- We are nationally recognized for our service to the Appalachian region
- Our alumni giving participation rate is one of the highest among U.S. Catholic universities

**There is global awareness of WU**

- Our campus student body represents more than 30 countries outside the U.S.
- We have globalized the student experience
- Every Catholic high school worldwide knows of WU
- Institutional support will improve quality of life in communities in our region and beyond

**Our overall performance is exceptional—we consistently raise our expectations and meet our objectives**

- We are operationally excellent in all we do and we are focused on financial sustainability in order to offer fulfilling employment to those in the region
- Our people know they are the reason we are successful and accept a culture of innovation and resourcefulness to continually improve and operate within its means

## ACHIEVING THE VISION: OUR STRATEGIC INITIATIVES

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Wheeling University has four **strategic initiatives**:

- I. **Vibrant Student Educational Experience**
- II. **Five Successful Areas of Study**
- III. **Global Awareness of WU**
- IV. **Operational Excellence**

Each of these initiatives has two or more related **strategic objectives** which will be accomplished through a series of **strategic programs**. The following pages describe these objectives and the key programs that are expected to have the most significant and immediate impact in bringing them to fruition. The programs, taken together, comprise the University's **strategic portfolio**. We will manage this strategic portfolio dynamically, with periodic re-prioritization that reflects success in achieving objectives, or the need to accelerate or delay programs in response to external circumstances and funding availability.

Achievement of the objectives described in this section, through successful execution of the programs, will move us towards our goal of self-funding educational operations and our vision of providing a vibrant student educational experience, operating five successful areas, achieving exceptional performance and becoming a global institution.

## Strategic Initiative I: **Vibrant Student Educational Experience**

Our most important function and responsibility as a university is to provide for the intellectual, social and spiritual growth of our students. Student development takes place within a broad context of settings extending beyond the classroom to residential and social life, co-curricular activities, athletic competition, worship, and internships. Wheeling University must build on the strong classroom-oriented and spiritual foundation it has always provided graduates, and significantly enhance opportunities for social development via a student experience that is rich, vibrant and engaging outside the classroom. We must make the University, and more broadly the local community of Wheeling, WV, a destination location.

**Overall Measure:** Increase freshman retention from 67 percent to 75 percent by Fall 2024.

### RELATED OBJECTIVES & KEY PROGRAMS

#### **Objective I.1** 100 Percent Residential Student Participation in Co-Curricular Activities

Vital learning takes place outside the classroom. Students do not make distinctions about their learning according to its setting. They benefit from diverse learning experiences in residence halls and by engaging in student government, student clubs, fine and performing arts, community service, athletics, retreats and worship. It is vital that all students take advantage of the tremendous opportunities that these out-of-classroom programs offer for gaining experience in leadership, career preparation, and, more broadly, for success in life—a key aspect of the mission as a Catholic school.

**Measure:** Achieve 100 percent participation in co-curricular activities among residential undergraduate students by 2024.

**I.1-1. Co-curricular learning outcomes & transcripts.** Out-of-classroom learning is a significant part of the student development. While WU already provides a wide variety of co-curricular opportunities to students, we have not been active in tracking these experiences and their outcomes, and ensuring that all students actively participate.

The introduction of co-curricular transcripts will provide students with a tangible product from their college experience that arms them with language to verbalize their accomplishments in job interviews or on graduate school applications. It also establishes

an expectation of participation in co-curricular activities, and provides a means of tracking institutional data to measure and continuously improve student engagement and co-curricular learning.

**I.1-2. Fine and performing arts.** Vocal and instrumental music, theatrical arts and visual arts are a foundational aspect of Catholic liberal arts education that spans the continuum from the general knowledge and appreciation expected of all students, to the active participation by many in organized activities such as choir and drama, progressing to the

career choice of fewer still via a direct field of study at WU.

The University intends to revitalize existing programs and develop new opportunities for fine and performing arts, both co-curricular and curricular. We are establishing connections with local community partners such as the *Capitol Theatre* in Wheeling, *Oglebay Institute* and the *Wheeling Symphony* to provide unmatched opportunities for students. Prospective students value the arts and WU will be a beacon for them in the Ohio Valley.

**I.1-3. Athletic traditions, programs and marketing.** College athletics is a central component in a vibrant campus culture. Our highly-competitive NCAA Division II athletic teams enjoy broad participation involving nearly 80% of all traditional undergraduate students at a varsity (or JV) level. Yet the University has not promoted these successes effectively to generate excitement, maximum game attendance, foster school spirit and create an engaging college atmosphere that increases overall awareness of the school, generates revenue opportunities and increases on-campus activity during weekends.

The University plans to address these opportunities via a new athletic website, mascot, social media promotion, and improved athletic fields. It expects to double student

attendance at all sporting events and increase student on-campus activity during weekends. Football has already been added and the addition of other new sports (e.g. acrobatics & tumbling) are also under evaluation.

**I.1-4. Faith development.** WU was founded to provide a Catholic education for young men and women in West Virginia and the Appalachian region. That mission is as strong today as it was in 1954 when the University was founded, and although some circumstances have changed over the years, hope for the future that education provides and fidelity to mission remains at the core of the university. The Catholic tradition of higher education places great significance on students' spiritual and religious development. The office of Campus Ministry at WU will expand its programs to help students integrate their faith, learning and experiences through worship, reflection and service. Campus Ministry programs will continue to encourage students to recognize and respond to the call of God in their own lives; support students in their ongoing spiritual and religious formation; and challenge them, in response to the God's call, to commit themselves to lives of service with and among others. Students will now also have the ability to take courses and receive a Pastoral Ministry Certificate.

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**Objective I.2 Leader in Experiential Service Learning Opportunities**

WU aims to be a leader among liberal arts and comprehensive colleges in providing Experiential Service Learning, such as internships and career opportunities, for students so that they can take active and vital roles in their communities. In the ongoing national dialog about the value of higher education, career placement is rightly assuming ever-increasing importance as an educational outcome, and it is therefore vital to provide students with advantaged avenues to meaningful employment.

**Measure:** By 2024, within six months of graduation, 90 percent of students will be employed or accepted into graduate programs.

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**I.2-1. Experiential Service Learning.**

Exciting, career-oriented internships, community service, and field experiences must be an integral part of a WU education, and we must do everything possible to assist our graduates in finding meaningful career opportunities. WU has established a centralized clearinghouse, *Handshake*, to ensure that all interested students have the opportunity to experience an internship field experience. Appalachian Institute, Student Government, Athletics Leadership, Honors, Student Clubs, Peer Tutoring & Mentoring, Community Service, Environmental Sustainability Service, Career Development & Dinner, and Residential Assistants are all listed in the course catalog with curricular codes for students to enroll in to meet this new requirement. Internships and/or community service will be integrated into the curriculum for all graduating students.

Relationships will be solidified with local firms, national employers, service organizations and ministries that have internship needs. A campus-wide protocol for internships will be established, setting forth credit hours, grading requirements, pay, field supervision and outcomes assessment.

Additionally, WU plans to supercharge its career placement services for graduating students, alumni and employers, matching job opportunities and providing ongoing career advice and transition assistance. Outcomes will be tracked with the goal to achieve 90 percent placement of graduating students into the workforce or graduate school within six months of graduation. These tools and services also will be made available to alumni, who we can assist with job transitions later in their careers to maintain engagement and foster higher giving participation rates.

**Objective I.3 University Campus / Wheeling Community Revitalization**

WU’s campus, facilities and the local community are central to providing a rich and vibrant student experience. The growth envisioned in this strategic plan necessitates revitalization of existing facilities and new development, providing opportunities for collaboration with the Wheeling community as we create a new plan for the University. New development need not be limited to our current campus. By partnering with local government officials, businesses and community organizations, we can create a thriving environment that enriches the residential and intellectual lives of students, faculty, staff and members of the community, so that, in the words of the Appalachian bishops, “God’s sacred Appalachia would remain a precious and beautiful home.”

**I.3-1. Campus plan and implementation.** This strategic plan establishes a new vision and requires an updated plan to support future development of the University. Primary requirements include reopening and expanded residential living arrangements and additional classroom capacity to support the significant enrollment growth envisioned in this plan. Further, many of WU’s grounds and facilities are tired and in need of revitalization. We cannot provide an

outstanding student experience without adequate facilities for living and learning.

Major components are expected to include working towards the re-opening of Thomas More and Sara Tracy Halls, revitalizing outdoors student spaces, repaving campus, and upgrades to campus dining areas such as the Benedum Room, Coffee Shop, and the Rathskeller. All of this requires a sense of our responsibility to the environment such that our campus can play a leading role “in a region that

can be marked by sustainable communities dedicated to a culture of life.”

**I.3-2. Strengthening Wheeling.**

Universities typically serve as “anchor tenants” for communities, and this is certainly true of the Wheeling/WU relationship. Our futures are interlinked; WU needs a vibrant Wheeling, and likewise, the city cannot flourish without a

healthy WU. So, we must be an effective leader and partner in the ongoing transformation of Wheeling.

The University, through external funding sources and private/public partnerships, will continue to explore opportunities to partner with other organizations to rejuvenate and showcase a revitalized Wheeling.

## Strategic Initiative II: Five Successful Areas of Study

While our University has been known to the world for many years, we have continued to operate internally with the structure of a small, Catholic college. This present initiative marks a major step in our transformation, with the revitalization of five areas of study: Arts, Sciences, & Theology; Business; Engineering & Construction Management; Education; and Health & Allied Sciences. The revitalization of these areas maximizes the educational value, professional relevance, and academic expansion of our programs through enhanced operations and marketing tailored precisely to the needs of our students and the achievement of exceptional student learning outcomes. Donors will have the opportunity to support educational areas of preference with meaningful gifts, further enhancing our capabilities. Ultimately these factors will drive enrollment growth, support self-funding educational operations, and significantly raise the internal performance and external recognition of the University as a whole.

**Overall Measure:** Increase overall enrollment from 928 (811 FTE) to 1,239 (1,122 FTE) by Fall 2024.

### RELATED OBJECTIVES & KEY PROGRAMS

#### **Objective II.1** Revitalizing the New Areas of Study

Our initial objective is to plan for, fund and launch each of the new areas with a special emphasis on educational program offerings, delivery methods, pricing, marketing communications and operating practices. Identifying prospective funding donors for each area will be among our highest priorities.

**II.1-1. Business, marketing and funding plans for each new area.** Revitalizing five new areas of study is a major endeavor and requires well-constructed and rigorous business, marketing and funding plans in order to ensure success. Key business planning elements include competitive positioning and a distinct value proposition for each new area, the addition of new, high-impact academic programs and delivery methods to exploit market opportunities, enumeration of prospect segments to target and development of pricing strategy. Further, each area requires a marketing communications plan that lays out specific markets, media, channels, partners and

promotion, and establishes planned spending and success metrics. Finally, a funding plan must be constructed that identifies key external partners and prospective lead donors to invest in each area.

As with the undergraduate day programs, a series of new program offerings are scheduled out over the coming five-year period. These programs combined with the further build out to the University's existing programs are projected to produce an increase in average annual growth rate overall with existing and new programs producing an increase in average growth rate respectively.

**New programs release dates:**

- **Fall of 2020** – 2 undergraduate online programs, General Education Core Curriculum and at least one certificate program online
- **Spring of 2021** – 3 undergraduate online programs and at least two certificate programs online
- **Fall of 2022** – 2 undergraduate online programs, 2 new master level online programs, 1 new doctorate online program and at least two certificate programs online
- **Fall of 2023** – 2 new undergraduate online programs, 2 new master level online program, 2 doctorate level online programs
- **Fall of 2024** – 2 master level online programs, 1 doctorate level program

This schedule of new and revised educational programs will serve as the foundation for our enrollment-driven revenue generation model.

**Discount Management Approach**

The management approach to work the current overall 70% discount rate down to an acceptable level will involve the following tactics:

1. The reporting structure has been modified whereby now the Financial Aid function reports directly to the University's Vice President of Enrollment.
2. A discount plan was approved by the University's Board of Trustee whereby a maximum discount was established as well as a target average discount. For the upcoming academic cycle (FY 2020-2021) this average discount has been set at 67%.
3. A weekly reconciliation is to be performed by the CFO between records maintained by the Athletic Department and those maintained inside the Financial Aid office. Quarterly reporting is required to be

presented to the University's Finance Committee.

4. Annually, the discount plan will be reevaluated by management and presented to the Board for approval.

Current projections are to hold the average discount rate to 67% for FY 2021 and FY 2022 then reducing that average to 65% over the following two years and then in the final year of the projection, FY 2025 reducing it to 63%. The purpose in holding at 67% and 65% for two years respectively is to aid in both athletic as well as non-athletic recruitment. Based on current enrollment projections the following table outlines the overall average decline in the discount rate.

**Undergraduate Discount Rate- Summary**

<u>FY</u>	<u>Overall Average Discount Rate</u>
2020	67%
2021	66%
2022	66%
2023	64%
2024	63%
2025	62%

These tactics will provide a moderate and controlled approach to drive down the discount rate. The longer-term strategy would be to continue to deploy these or similar tactics to bring the University's rate in line with national averages.

**II.1-2. Initial area-specific recruiting and operational practices.**

Each area will be marketed “vertically” by profession as a primary mechanism for graduate and professional students, and as a supplement to standard “horizontal” recruiting practices for traditional undergraduates as well as competitively promoting in the online market. Industry professionals with deep experience in the broad academic discipline will drive

business development and recruiting for each area. They will establish conduits with area employers to bring a steady stream of students to WU, as well as providing specialized guidance to prospects in evaluating and choosing among competitive degree programs. Each area will also house programs accredited by top educational and professional organizations to insure the critical alignment and frequent renewal of key curriculum standards, faculty procurement and retention, and timely student academic progress and relevant success.

**II.1-3. Branding campaign for new territories.** Over the past decade, WU’s primary marketing territory has shrunk inward in response to economic and demographic trends, with enrollment from the Mid-Atlantic

states dropping significantly. Although it is important for Wheeling University to recruit students from Appalachia, it cannot prosper while limiting enrollment to the local area. Families from the Mid-Atlantic region have higher average income levels and require less institutional aid. WU must increase marketing awareness in expanded territories including the Mid-Atlantic area, Michigan, Indiana and Massachusetts. We provide one of the most affordable values among the 1,300 Catholic colleges world-wide.

This program will select specific markets to target, including the online market, improve articulation of the WU brand, and create promotional products that are outcome based—illustrating successful young graduates in business, education, the arts and the sciences.

**Objective II.2 Learning Outcomes Viewed as a Model for Higher Education**

With increased focus on educational learning outcomes in accreditation and public policy, it is vital for WU to build on our already exceptional record to become a role model for other Catholic universities of comparable size, regionally and nationally, and for higher education in general. We are understandably proud of regularly achieving strong pass rates on national board or certification exams and our extremely high acceptance rate for students who apply to law or medical school, and our performance in standard assessments of student engagement. We intend to make further internal investments in order to become a national leader in learning outcomes especially as they relate to the Catholic mission of the school and the changing learning identity of students and faculty from face to face to include online and hybrid learning. There is more we can do.

**II.2-1. Outcomes assessment.** Required by external accrediting bodies and receiving renewed attention from the federal government, developing a nationally-recognized outcomes assessment program is not optional. Demonstrating success is crucial in recruiting students, securing external funds and establishing a national reputation.

Careful outcomes assessment is essential in establishing priorities for continuous improvement, and our accrediting body will expect a robust assessment program in place

for all University operations by our next visit. While our academic programs have made major strides forward in outcomes assessment and are now exceeding expectations, we still have more work to do in developing an outcomes assessment plan to include all programs as well as the core curriculum to achieve full Assessment Across the WU Curriculum. We also must assess outcomes of study abroad, internships, community and immersion service and student research.

Funds to support the upfront costs of our enhanced assessment efforts will be sought from the U.S. Department of Education's Strengthening Institutions program. Our intention is to establish a fully integrated, outcomes assessment underpinned by educational technology resources, a faculty

oversight committee, faculty development initiatives, and delineation of a five-year program accreditations plan, processes, supporting tools and personnel. Our plan will be benchmarked against peer and aspirant institutions of WU.

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### **Objective II.3 Recognized for Our Service to the Appalachian Region**

A distinctive and vital aspect of the Wheeling University mission is the University's commitment to the Appalachian region, whereby we embrace our human reality in order to help make the world a more fitting place in which to live. From our Appalachian Institute, to our experiential service learning, our development of professionally-trained students, and our scholarly research on subjects of importance to the region, we intend to increase the scope and prominence of our impact.

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**II.3-1. Appalachian Institute ("AI") expansion.** Inspired by the call for action at the local level made in the 1975 publication *This Land Is Home to Me: A Pastoral Letter on Powerlessness in Appalachia* by the Catholic Bishops of the region, the AI's mission is to work toward safer, healthier and stronger communities in the central Appalachian region by addressing contemporary issues like energy choice, water quality and public health. The Appalachian Institute hosted three distinct trips in 2012; Service, Energy, and Health Care. The program has evolved to incorporate all three areas into each of its trips with emphasis or weight of each to suit the needs of our visiting schools. Virtually every visiting group witness firsthand the local environmental effects of our coal and gas industries and examines the resulting public health and water issues. Each also explores our history, culture, and labor related issues at the hands of energy companies to bring context to the service they are providing. The program now hosts more than thirty schools each year from every corner of the country, as many as sixteen during college spring breaks, and the immersion program has expanded its summer schedule to equal that of the college spring breaks. In the past two years

the Institute has hosted no less than a dozen high school or parish groups from across the country during the summer months. The development of additional service opportunities to accommodate the increased capacity, and some of the specifics of our self-funding program are explained below.

Growth of the Appalachian Institute Immersion Program since the 2010 strategic plan:

- 2011 – Appalachian Institute hosted 14 immersion groups
- 2012 – Appalachian Institute hosted 18 immersion groups
- 2013-2019 – Appalachian Institute hosted more than 30 groups each year

In total, Appalachian Institute has hosted more than 50 different schools or organizations for immersion trips since 2012. There are also numerous partners with whom we have worked statewide:

- More than 40 service partners
- More than 12 energy partners
- More than 15 health care partners
- More than 15 educational partners (culture and history)

- We have also helped dozens of individual families statewide in need or in times of crisis.

AI's immersion program is self-funding, provides a major benefit to the region and helps further establish our distinct identity as the primary Catholic university serving Appalachia. Below is a summary of a typical yearly immersion budget:

- Approximate yearly income:  
\$150,000
- Approximate yearly expenditures:  
\$60,000
- Estimated yearly profit of immersion program:  
\$90,000
- Approximate yearly salaries of AI employees:  
\$50,000
- Typical yearly profit of AI's immersion program after salaries and expenditures:  
\$40,000

Data alone cannot measure the impact that the Appalachian Institute's immersion program has in our region, but AI's immersion students provide approximately 9,000 service hours a year to our communities. Below is data used to estimate the total service hours provided by our visiting volunteers:

- Approximately 450 students/volunteers visit per year
- Average service hours per week per student - 5 hours x 4 days = 20 hours per student
- 450 x 20 hours = 9,000 total service hours provided.

A second expansion opportunity involves a longer "semester abroad in Appalachia" program that would bring international college

students to WU for similar service-oriented purposes focusing on Appalachia. It would highlight the AI, the English Language Institute, WU's proximity to Washington D.C. and New York, and capitalize on State Department grants for full tuition and room/board.

A third expansion opportunity could involve identifying alumni of AI's immersion program as a resource for local advocacy and research efforts. This could be incorporated into the "Call to Action" module of AI's immersion program.

**II.3-2. Targeting Experiential and Service Learning to help the Appalachian Region.** This goal builds on the strength of the Appalachian Institute and many of our program in which our students regularly engage in service activities to help the poor, neglected, under-served and deserving individuals and communities in the region. In order to reach this goal, the University now requires all students to complete at least one course in which service and professional projects will be carried out to benefit our Appalachian communities as well as the students themselves in terms of academic and personal development. These activities are also critical to our Assessment Across the Curriculum plan, which includes assessment measures and outcomes for student co-curricular as well as academic experiences and success. The immersion program has always utilized WU students to assist with the work and service of the Appalachian Institute. Their role was critical in the expansion of the immersion program, particularly the students in our Arrupe Scholarship program.

**Objective II.4 Funded Aspirations to be one of the Highest Among U.S. Catholic Universities in Alumni Giving Participation**

Achieving Wheeling University’s high aspirations will require the generous support and investments of external benefactors, foundations, corporations and alumni. The new areas of study and facilities outlined in our plan provide many outstanding opportunities for donors to become engaged with us in their personal areas of interest as we transform the University. One vitally important constituency is our alumni, whom we plan to re-engage in our new vision through their financial support at participation ranking among the highest of all other Catholic Colleges and Universities in the U.S.

**Measure:** Achieve an alumni giving participation rate of at least 50 percent by 2024.

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**II.4-1. Individual donor identification and cultivation program.** Without donors who have substantial giving capacity and who care deeply about the University, funding for major projects will be unsuccessful. This program identifies potential donors with the capacity to make meaningful gifts and engages the donors in a dialog about how they might make an impact in implementation of a campus plan and other strategic programs. We envision a rolling database of approximately 50 major donors with large capacity to give, from which we might receive 4–6 major gifts per year.

**II.4-2. Capital campaign.** We must lay significant preparatory groundwork before a major campaign can be announced publicly. WU has embarked upon a Let Your Light Shine capital campaign with a goal of securing twenty-five million dollars over five years, during which we will identify, educate and cultivate major donors, and uncover and resolve potential obstacles to success.

**II.4-3. Alumni giving participation.** Part of the groundwork for a successful capital campaign involves increasing alumni giving percentage. To move from the

institution’s history of 10 percent participation to above 50 percent will require a high level of organization, technology, creativity and effort to re-engage alumni in the life of the University. We plan a new, comprehensive alumni program involving an engagement suite of tools, systems and procedures to regularly identify alumni aspirations and to allow one-to-one communication that engage alumni with the University by affinity for future donation solicitation. This type of affinity programming engages alumni in special interest areas such as academic majors, campus activities or professional associations, and will be essential in any future comprehensive capital campaign.

**II.4-4. Foundation solicitation.** Major gifts are available from foundations and corporations where there is a strong correlation between their stated missions and WU’s aspirations, but they require a high level of organization and effort to identify and bring to fruition. We must build systems and procedures to regularly identify appropriate funding sources and establish relationships with existing sources to streamline future donations.



## Strategic Initiative III: Global Awareness of Wheeling University

WU is part of a global community in which communication, commerce and travel are becoming more interconnected with each passing day. We are committed to widening our focus in recognition of the new opportunities and imperatives this requires of us and our graduates in the early 21st Century.

Currently our campus-based student population originates from 15 countries outside the U.S. Over time under this important initiative there will be a growing awareness among prospective students, families, and educators worldwide that WU is among the leaders in providing a global experience and education.

**Overall Measure:** Grow our international student enrollment by 10% by 2024.

### RELATED OBJECTIVES & KEY PROGRAMS

#### **Objective III.1** Globalized Student Experience

We seek to provide a campus community infused with global interconnectedness by offering plentiful opportunities to learn about the world and experience cultural and religious differences through on-campus interaction with students from other countries. The curriculum will take advantage of our increasingly global nature to promote understanding of the world from an international perspective. Many more of our graduates will gain fluency in languages, study abroad and consider international internships.

**III.1-1. Diverse cultural exchanges between all students.** A globalized campus best prepares students to live, work, and serve in a global society. This program will bring foreign and distal student perspectives to local students' experiences in a common environment that respects all faith traditions. It will establish a Multicultural Affairs office that assists in the exploration and appreciation of the differences among students and helps them to reflect with others on how their shared experiences change the way in which they interact with the world. It will offer weekly diversity programming, promote global curricular innovation, strengthen study abroad opportunities, initiate more global

exchange partnerships, facilitate a variety of international internships, support programs that value all faith traditions and forge stronger bonds with WU alumni living overseas.

**III.1-2. English Language Institute (“ELI”) revitalization.** WU intends to restore the ELI, a language school offering an immersive experience in English language instruction. Achieving our goal of accommodating 10% more international students by 2024 will require expansion of the ELI. Many will not be native English speakers, and WU provides a supportive environment allowing each individual to gain language fluency quickly and hopefully, matriculate in a degree program.

**Objective III.2 10 Percent of Enrollment from More Than 30 Countries**

We aspire to significant growth in the enrollment of students originating from outside the U.S., representing a wide variety of countries and regions of the world; these students will see WU as an institution offering an excellent education, a welcoming community and the support they need to succeed.

**Measure:** By 2024, students from at least 30 countries will be enrolled at WU.

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**III.2-1. Worldwide Catholic high school awareness.** There are over 1,200 Catholic high schools around the world, providing the Institution with a ready-made conduit for inviting international prospects to a Wheeling University education. This

program establishes a global recruiting effort that will build relationships with and awareness among these Catholic high schools and commence relationships with international contracting agents and alumni to bring international prospects to WU.

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**Objective III.3 Institutional Support Programs Assists Communities in Our Region and Beyond**

Utilize institutional support to improve quality of life not just in Appalachia, but globally. WU seeks to live up to its calling as a Catholic university: “to be a social force, to be aware of its social reality, to shed university intelligence upon that reality and to use university influence to transform it.” Diversify our institutional support programs beyond dependence on public funding to include private, corporate and foundation sources, and further integrate these programs into the broader operations of the University.

**Measure:** Achieve a pipeline of awarded grants of at least \$1.2 million by 2024.

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**III.3-1. Revitalize institutional support.** The University must develop a structure that facilitates the transition from non-competitive grants and earmarks gained through congressional offices to one that supports faculty and staff in submitting competitive proposals to agencies, organizations, corporations and foundations. A revitalized program will nurture the development of grant writing skills, diversify the types of grants and sources of grant funds, and build towards \$300,000 thousand per year in funded projects that complement traditional WU programs and provide benefits such as additional opportunities for students.

Success in the competitive grants arena, with the proper public relations efforts, will enhance our reputation and standing in the region and around the world, and add substantial growth and value to the WU brand. The TRIO grant will be tackled by our Director of Student Success and we will utilize our consortium agreements with entities such as ICE, ACA, and WVICU to utilize a shared grant writer.

**III.3-2. Commercialize programs for the benefit of communities and the University.** WU’s past success in commercializing research in the areas of math

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education, science education and healthcare provide opportunities that are rare among liberal arts-based institutions. We must build on this foundation by establishing a business incubator within the University to achieve profit centers. This incubator will be a student

club organization monitored by the business department faculty. Through this and other efforts, we are poised to make significant contributions in areas that will benefit communities in Appalachia and beyond.

## Strategic Initiative IV: Operational Excellence

Operational excellence is a philosophy of continuous improvement throughout an organization that focuses on customer needs and the optimization of processes. It emphasizes teamwork, problem solving, employee empowerment and judicious use of technology in pursuit of efficiency and quality outcomes. While it originated in manufacturing, it is extremely applicable in the service-oriented environment of higher education. Wheeling University has opportunities to improve processes and enhance outcomes for students, families and other members of the University community. This initiative begins a process of operational improvement that will increase customer satisfaction, build employee engagement and reduce costs.

**Overall Measure:** Achieve educational operations without a loss by 2024.

### RELATED OBJECTIVES & KEY PROGRAMS

#### **Objective IV.1** Operationally Excellent in All That We Do

We will inculcate a philosophy of operational excellence throughout the Institution, empowering administrators, staff and faculty to strive for continuous improvement in meeting student and employee needs and providing the highest level of service and desired outcomes for our customers.

##### **IV.1-1. Operational process re-design.**

WU's operating practices and processes must consistently achieve high standards and make it easy for our customers to do business with us. This program provides a structured approach to evaluate and where necessary to re-design both student-facing and back office operating processes from the ground up, with the aim of improving student service and reducing costs. The program also will establish continuous improvement of processes based upon ongoing assessment.

##### **IV.1-2. Technology roadmap.**

Wheeling University requires a fully-functioning technology infrastructure to support its planned growth. Past underinvestment in technology has resulted in suboptimal systems; in some cases, we lack maintenance contracts to support upgrades or

enhancements. This effort will evaluate the management and operating systems at WU, determine future educational, research and administrative needs, and explore new technologies and solutions. We must adapt from traditionally all face-to-face instruction to hybrid and fully online instruction. The use of digital software such as Slate, Colleague, Paycom, Blackboard, and other learning management systems will allow us to achieve success in virtual classrooms, have efficient record keeping processes, and make data informed decisions.

**IV.1-3. Growth methodology.** As enrollment grows, tuition revenue and contribution also will rise. We must be judicious about reinvesting in the Institution, planning for controlled growth of operating expenses to support our strategic portfolio.

This program will develop the financial models and establish the appropriate ratios

for growth within each of the new areas of study, such that we invest wisely.

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**Objective IV.2 Our People Know They Are the Reason We Are Successful**

Our faculty, staff and administrators are our greatest asset. We intend for all to be completely engaged in their jobs and feel appropriately rewarded for their contributions that allow us to be successful. We will nurture a culture of performance, respect and cooperation in the Catholic tradition of cura personalis (care and respect for each person).

**Measure:** Increased employee satisfaction.

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**IV.2-1. University performance management system.** Members of the University community need to understand expectations for what constitutes good performance, and have the opportunity to be rewarded for achieving it. A performance management system, built within Paycom, provides a structured means of establishing expectations (i.e. goals), evaluating performance, rewarding it (with bonuses or other means), and guiding people to grow and develop in their roles. Further, cascading goals provide the means to operationalize the strategic plan. Our employees accept a culture of innovation and resourcefulness to

continually improve and operate within its means. We are focused on financial sustainability in order to offer fulfilling employment to those in the region.

**IV.2-2. Vision, values and brand workshops.** Members of the WU community must understand our vision, values and Catholic brand, and how they fit and contribute to the mission of the institution. This program provides that understanding. It utilizes workshops as informational tools for WU employees to move forward with the strategic plan in a positive way and encourages them to become a part of the big picture.

## MEASURING OUR PROGRESS

This section summarizes the primary measure for each of our four strategic initiatives. Some may ask, “Why only one measure per initiative?” Our objective is focus and simplicity. While we will measure other aspects of our progress as well (see Table 2), if we are able to achieve these primary goals, then this strategic plan will have been a great success for the University.

**Table I. Primary Planning Measures**

Strategic Initiative	Measure	Baseline	2022 Target	2023 Target	2024 Target	5-Year Change	% Change
I	Freshman retention	67%*	69%	72%	75%	+8 pt.	+12%
II	Total enrollment <sup>1</sup>	928	1,131	1,184	1,239	+311	+33.5%
III	International student campus enrollment	21	30	40	50	+29	+138%
IV	Net margin from educational operations <sup>2</sup>	-14%	-1%	6%	16%	+30 pt.	NM

\*Historic baseline used, previous year was irregularly low due to declaration of financial exigency.

<sup>1</sup>Includes full-time and part-time undergraduate and graduate students, online students, and high-school students enrolled in current courses.

<sup>2</sup>Excludes all external sources such as the annual fund, investment income and institutional support contributions.

As a supplement to the primary measures, we plan to track progress on the following metrics that relate to specific objectives and programs (as indicated). These metrics are listed with the caveat that they represent our thinking in the early stages of a strategic planning rollout that is dynamic and will continue to evolve. As we implement the plan, our timetables and goals will be re-evaluated periodically in light of the progress made, available funds and evolving circumstances.

**Table 2. Supplemental Planning Measures**

Pertains to:	Measure	Baseline	2024 Target	5-Year Change	% Change	Note
I.1	Co-curricular activities participation	95%	100%	+5 pt.	5%	1
I.2	Graduating student placement	TBD	90%	TBD	TBD	2
I.2-1	Experiential Service Learning	60%	100%	+40 pt.	+67%	3
II.1-3	Non-local market U.S. enrollment	332	566	+234	+70%	4
II.4	Alumni Giving Participation	10%	50%	+40 pt.	+400%	5
III.2	Countries represented	15	30	+15	+100%	
III.3-1	Grants	1	10	+9	+50%	6
IV.2	Employee satisfaction index	TBD	TBD	TBD	TBD	7

**Notes to Supplemental Planning Measures**

1. Based on residential students.
2. Placement of graduating students into the workforce or graduate school within six months of graduation.
3. Percentage of graduating degree-seeking traditional undergraduates participating in internships and service during their time at WU.
4. Enrollment of traditional undergraduate U.S. students ineligible for the local scholarships.
5. Percentage of alumni giving participation.
6. Total annual grants submitted. Includes competitive and non-competitive grants (i.e. earmarks) from all public and private entities.
7. Measures improvement in a composite of attributes related to employee satisfaction. Baseline has yet to be established.

## FUNDING OUR TRANSFORMATION

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Throughout the country, higher education institutions, especially small- and medium-sized private colleges, are facing challenges with their primary economic engine of delivering education. Most rely heavily on external funding, such as return on endowment investments, annual fund gifts and contributions. In economically challenging times, these external funding sources become unreliable.

Wheeling University is no different, except that as a young university with a modest endowment and small alumni base, we are even more susceptible to economic downturns. While other institutions have reacted to these circumstances by establishing goals to lessen their dependence on tuition revenues, we are taking the opposite approach of embracing ours—establishing a primary goal *of self-funding our educational operations fully with tuition revenues*. Achieving this goal will allow us to operate indefinitely without endowment draws, and affords us the luxury to invest gifts fully in the future growth of the Institution, through the programs outlined in this strategic plan, rather than using them to fund operations.

The University has embarked upon a capital campaign with a goal of securing twenty-five (25) million dollars over five (5) years. This campaign is focused on raising unrestricted dollars that will assist Wheeling University with operational and capital expenses. The campaign is not aimed at focusing on the projects or the amount of money, but on the benefits to the students and the greater Wheeling. The goal of this campaign will provide an ability to demonstrate to the community that the updated facilities or enhanced endowment will provide educational opportunities through expanded, increased or more efficient programming.

We will use two main campaign solicitation pieces. These materials will have the same branded messaging, but will be focused on various target markets. This will include one targeted mailing and engagement effort aimed at alumni, friends of the University, and parents/families (both past and present). The second effort will focus on area business or other interested community partners. Both electronic and mailed materials will be sent and will be reoccurring with each year of the campaign.

In addition to the above-named annual appeal the following campaign elements will also be executed:

- **Employee Campaign**
  - Kick-off Breakfast will be held in October, and every year after
  - Internal campus mail and email will be sent regularly regarding the use of donations to support our great campus



## WHEELING UNIVERSITY

- An annual Chair and building captains will be selected each year to assist in the execution and follow up
- The campaign will include a peer-to-peer ask and a program about what makes our campus great
- Included Employee Solicitation Ask with all New Hire information at onboarding.
- Feature a Weekly Employee Giving Update and Donor Spotlight
- **Foundations and Corporations**
  - Re-establish/establish relationships with area Foundations and Trusts, as well as with key area businesses
  - Utilize the Catholic Funding Guide to identify new sources of funding aimed at supporting the only campus based Catholic institution of higher education in West Virginia
  - Engage Chamber of Commerce list for a Business Drive aimed at focusing on the economic and general impact of this great institution in the business community
- **Senior Class Gift**
  - The Office of University Advancement will meet with Senior Class Officers and educate them on the tradition of a class gift and the value to the University. The Office will work with the group to design a gift and approach for achieving goals related to the same

Wheeling University will also send out additional targeted communication throughout the year through its assembled affinity groups. Examples include the following:

- **Athletic Teams**
  - Letter from coach with personal introduction of self, team stats, team picture, etc. to alumni groups. These letters will include appeals to the alumni players and family members along with information about current students in the fielded groups.
- **Campus Ministry/Service Office**
  - Let alumni know Campus Ministry is alive and well, and provide information on upcoming service projects. Ask alumni to participate in one or two service projects each year and to provide financial support to WU to continue its great community-based efforts.
- **50 Year Club**
  - Members of the Class of 1959 thru 1969 will assist in building the general campaign efforts to be engaged in the following:
  - Recruit and Work with Senior Ambassadors in communicating peer to peer with classmates.
  - Provide class lists for calling and solicitations.
  - Work on personal letters with leaders of each class group to engage donors.
- **Other Individual Class Groups** – Class of 1970-1989

## JOURNEY FORWARD TOGETHER

- Recruit and Work with Class Gift Chairs
- Ask them to recruit 3 or 4 of their classmates to help them make personal contact with other classmates- begin the Let Your Light Shine connection.
- Provide class lists for calling and solicitations.
- Work on personal letters with leaders of each class group to engage donors.
- **Solicitation by Major**
  - Letter from professor with introduction of self and program. This will include "happenings" and program goals and efforts. It will also include a solicitation element to engage donors to give in the continued effort to educate men and women in life, leadership and service (for and among others).
- **Parents**
  - Personalized letter asking for their support in honor of their child or a professor that helped their child while at Wheeling University. Letters will include the impact
- **Additional Communications**
  - Electronic - Student and Faculty highlights and thank you messages- sent via email and social media posts.
- **Donor VIP Events – On Campus – Quarterly**
  - Gaudiosa
  - Ken McBride
  - Schedule Dr. Jimenez's nephew, Carlos lbay who is a world-renowned Pianist, to perform.
  - Dueling Pianos Fundraiser
- **Donor VIP Events – Off Campus**
  - Alumni Gatherings Around the Country-Out in the public or in someone's home
  - Party with a Purpose development- fundraising challenged for alumni groups to gather and raise the most money.
  - Intimate dinner or lunch with major donors and foundation leaders with University President.

While funding availability may lead us to delay (or accelerate) aspects of this plan, we are confident that through these resources, we will be able to make significant progress towards our strategic goals.

## APPENDICES

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- A. Strategic Plan Summary
- B. Vivid Vision Statement
- C. Strategy Map
- D. Mission & Identity Companion Document

## REFERENCES

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- A. Five Year Financial Sustainability Plan
- B. WJU Mission Priority Examen
- C. Declaration of Shared Purpose

2020-2024 STRATEGIC PLAN  
adopted by the  
WHEELING UNIVERSITY  
BOARD OF TRUSTEE'S  
on September 11, 2020.

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*Edward Shabady – Acting Chair, '60  
President and Medical Director, Diabetes Master Clinician Program INC, Clinical Professor of  
Family Medicine, University of Miami*

*Maribeth Arlia – Secretary, '05  
Co-owner, ACE Digital Academy*

*Chad Carter, '99, '01  
Chancellor, Diocese of Wheeling Charleston*

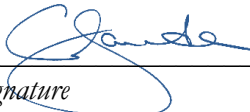
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President, Wheeling University*

  
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Signature

9/11/2020  
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Date