

**THE CITADEL**  
**HIGHER EDUCATION ACCOUNTABILITY REPORT FOR 2008**  
**15 September 2009**

**SECTION I – Executive Summary**

1. Mission and Values

The Citadel Board of Visitors adopted the following statements of Vision, Core Values, and Mission on 14 September 2002.

**Statement of Vision**

Achieving excellence in the education of principled leaders.

**Core Values**

**Academics:** We produce graduates who have insight into the issues, ideas and values that are important to society and possess the skills necessary to deal with them successfully.

**Discipline:** We operate a leadership laboratory which emphasizes a structured environment, acceptance of responsibility, self-confidence and service to others.

**Diversity:** We promote diversity in all segments of our campus community and in all aspects of college life.

**Duty:** We emphasize the importance of individual accountability and the moral obligation of responsibility for the welfare of others.

**Honor:** We adhere to a code which teaches that uncompromising personal integrity is the primary guide in all situations.

**Morality:** We believe that an individual's character is of utmost importance and, therefore, we provide training which emphasizes ethical principles and core values.

**Mission**

The Citadel's mission is to educate and prepare graduates to become principled leaders in all walks of life by instilling the core values of The Citadel in a challenging intellectual environment.

2. Major Achievements for 2008-2009

Citadel is very pleased with a number of its achievements in 2008-2009. Among these are the following:

**U.S. News: The Citadel is No. 2 best public institution in the South for those offering a master's degree--**The Citadel is the only South Carolina college that combines a quality undergraduate education with outstanding value, according to the latest U.S. News & World Report rankings. The Citadel ranks No. 7 best value among Southern colleges and is the No. 2 best public institution in the South among those offering up to a master's degree. According to U.S. News editors, "the most significant values are among colleges that are above average academically." In the 2008 rankings, The Citadel is also:

- No. 5 among the best public and private universities in the South offering up to a master's degree but few, if any, doctoral programs. The college was No. 7 last year.
- No. 34 among the nation's best undergraduate engineering programs at schools where the highest degree is a bachelor's or master's.

**School of Engineering re-accredited by ABET--**The Citadel School of Engineering underwent a rigorous self-study reaccreditation process during the 2008-2009 academic year. ABET awarded full reaccreditation to the school's departments of Civil and Electrical Engineering. The accreditation decision indicates that the school and its programs meet the rigorous standards set forth by the professional engineering community.

**School of Business Administration named one of nation's best--**The Citadel School of Business Administration has been named one of the nation's top 290 business schools by The Princeton Review. The New York-based education services company profiles the school in the 2008 edition of its "Best 290 Business Schools." The college's selection is based on survey results collected from students at the best AACSB-accredited MBA programs in the world and statistical information gathered from numerous sources. There are 553 business schools or business programs with AACSB accreditation nationwide. The Princeton Review does not assign a number to the schools that its ranks among the best in its annual evaluation.

**School of Education re-accredited by NCATE--**The Unit Accreditation Board for the National Council for Accreditation of Teacher Education (NCATE) has granted The Citadel School of Education continuing accreditation. The accreditation decision indicates that the school and its programs meet the rigorous standards set forth by the professional education community. The state of South Carolina mandates that all professional education programs at state institutions achieve NCATE accreditation.

**Sue Mitchell named Vice President for Finance and Business Affairs –** A certified public accountant, Sue Mitchell has served as the Vice President for Business Affairs at CSU since 2003, where she was responsible for financial and accounting operations, procurement, treasurer, budget, human resources, facilities management and construction, auxiliary services, and risk management. Mitchell also had oversight of a separate for-profit land development and joint venture corporation, which includes a franchise hotel operation and separate infrastructure. Before that she held consulting and financial management positions at Kaplan EduNeering, Hill-Rom Associates, United Medical Corp., and Blue Cross Blue Shield of Florida. Mitchell earned a master's degree in business from the University of South Florida and a Bachelor of Science in business administration/accounting and marketing from the University of Central Florida.

**Marine Corps Col. Leo A. Mercado, Citadel Class of 1979, named The Citadel's Commandant of Cadets.** Mercado served as secretary of the General Staff at Headquarters Marine Corps in Arlington, Va. He was the principal assistant to the director of Marine Corps Staff for coordinating, supporting, and administrating all staff actions. Mercado earned a degree in political science from The Citadel in 1979 and received his master's degree in public administration from Shippensburg University and a master's degree in Strategic Studies from the U.S. Army War College. During his Marine Corps career, Mercado served as chief of staff at Marine Corps University where he was responsible for 450 military and civilian personnel and an operating budget of \$25 million. He also commanded the Security Battalion at Camp Pendleton, Calif., served as chief of the military liaison team in Bucharest, Romania; commanded the First Recruit Training Battalion at the Marine Corps Recruit Training Depot at Parris Island and served as aide to the president of the United States.

**New Strategic Plan completed during the 2008-2009 academic year.** The Citadel's Blueprint: Strategic Plan for Educating Principled Leaders was constructed thorough a campus-wide collaborative process this year. This plan communicates the institutions priorities for 2009-2012.

**Citadel Graduate College Leadership Seminar--**The Krause Center for Leadership and Ethics and the Student Government Association of The Citadel Graduate College hosted the first Citadel Graduate College Leadership Seminar. The seminar welcomed more than 50 student delegates from The Citadel Graduate College and the College of Charleston Graduate School. The theme for the event was "Lasting Leadership through Effective Decision Making." This inaugural graduate seminar was offered in response to the significant graduate student participation in The Citadel's Principled Leadership Symposium held annually in March and as a means to provide graduate students with additional leadership learning opportunities at The Citadel. The seminar expanded on its theme with an interactive schedule featuring two keynote speakers: Nancy McGinley, superintendent of the Charleston County School District, and Allison Dean Love, CGC '93, executive director of the South Carolina Insurance News Service and a member of The Citadel's Board of Visitors.

**Stadium West-side Stands construction complete--**The new addition to the West side stands of Johnson Hagood Stadium is complete. The impressive structure is home to the South Carolina National Guard Readiness Center as well as The Citadel's new press box, sky box suites, club lounge, and club seats, all of which are top of the line and comparable to any major university. The South Carolina National Guard Readiness Center is an integral part of the stadium renovation. The Citadel and the National Guard will benefit by the shared use of classrooms and other joint areas. Phase IV will include a complete renovation of the East side stands. The stadium is also vital to the county's emergency preparedness, as it serves as the South Carolina National Guard Readiness Center. The Citadel received a commitment from the Charleston County Council to provide \$3.5 million from the county accommodations tax revenue that will help retire a portion of The Citadel's debt on the \$42 million Johnson Hagood Stadium renovation, a project that is anticipated to have a significant economic and tax benefit for the county. A study by the Charleston Metro Sports Council estimates Johnson Hagood Stadium will generate \$1.5 million in accommodations tax revenue over the 10 years of the county's investment, and will continue to generate tax revenue over the 50-year projected life of the renovated stadium. Additionally, the newly refurbished stadium will have an estimated economic impact on the Charleston area of \$366 million over the next 10 years.

**Small Business Development Center opens at The Citadel--**Underscoring its commitment to the economic growth of the Lowcountry, The Citadel School of Business Administration has joined forces with the South Carolina Small Business Development Center to expand services to new and existing entrepreneurs in the Charleston metro area. The Small Business Development Center offers services on The Citadel campus. The Small Business Development Center, a counseling partner of the U.S. Small Business Administration, helps people with small business start-up ventures and assists in the continued growth of small businesses with funding from federal, state and private funds.

**The Mentors Association within The Citadel School of Business Administration recognized by the National Academic Advising Association (NACADA)**—The School of Business Administration was awarded the "Outstanding Institution Advising Program Certificate of Merit." The Mentors Association was established to enrich the education of business students through a relationship with local business leaders. A group of active and retired top executives from corporate America, the mentors are committed to sharing their experiences with The Citadel's undergraduate and graduate business students, helping them develop career ideas and enhance their prospects for success. NACADA promotes and supports quality academic advising in institutions of higher education to enhance the educational development of students.

### 3. Key Strategic Goals

The Citadel Board of Visitors, our governing board, voted to approve a new Strategic Plan with revised Strategic Initiatives during academic year 2008-2009. These Strategic Initiatives were revised as follows by the Board of Visitors at its June 2009 meeting:

- A. Develop Principled Leaders in a Globalized Environment.
- B. Strengthen the College through Institutional Advancement.
- C. Enhance the Learning Environment.
- D. Develop the Student Population.
- E. Enhance the Facilities and Technological Support for the Campus.
- F. Improve Institutional Effectiveness.
- G. Ensure the College has the Leadership and Talent to accomplish these Strategic Initiatives.
- H. Provide Outreach to the Region and Serve as a Resource in its Economic Development.

During the 2008-2009 academic year, The Citadel campus community built a new strategic plan which addresses each of these initiatives. The Citadel Blueprint: The Strategic Plan for Educating Principled Leaders, approved by the Board and the Senior Leadership Team in summer 2009, is presented in Attachment III.

### 4. Key Strategic Challenges

The Citadel has identified the following as barriers and has attempted to address these through budget requests and fundraising efforts:

- Annual State appropriations levels
  - Does not cover HEPI annual inflation
    - Recruitment and retention of quality faculty and staff
    - Construction costs
    - Contracting costs
    - Energy costs
- Lack of State funded capital financing
  - Lack of a bond bill in recent years
- Inadequate need based scholarship funds
- Deferred maintenance deficits mounting (\$70 million)
- \$7.8M in FY08/09 unfunded requirements

### 5. How the accountability report is used to improve organizational performance.

The Citadel submits annually by law the Institutional Effectiveness Report. This report is based on annual assessment reports that are required of every budgeted department/operation of the College. These reports are provided to each vice president and provide the College a context for budget decisions, resource allocations, and fundraising priorities. The Annual Accountability Report provides the College the opportunity to take a “big picture” look at all data that has been collected through various assessment activities across the College. The Citadel continues to take strong, aggressive steps to solidify and enhance its leadership development model as we strive to meet our mission to educate and prepare graduates to become principled leaders in all walks of life by instilling the core values of The Citadel in a challenging intellectual environment. Under the leadership of Lt Gen John Rosa, The Citadel has initiated a program on Values and Respect that places respect for self and respect for others in all matters as the cornerstone for The Citadel’s leadership development model.

## SECTION II – Organizational Profile

1. Your organization's main educational programs, offerings, and services and the primary methods by which these are delivered.

Throughout its history, The Citadel's primary purpose has been to educate undergraduates as members of the South Carolina Corps of Cadets and to prepare them for post-graduate positions of leadership through academic programs of recognized excellence supported by the best features of a structured military environment. The cadet lifestyle provides a disciplined environment that supports the growth and development of character, physical fitness, and moral and ethical principles.

A complementary purpose of The Citadel, realized through The Citadel Graduate College, is to provide the citizens of the Lowcountry and the State of South Carolina opportunities for professional development by offering a broad range of educational programs of recognized excellence at both the graduate and undergraduate levels. These programs are designed to accommodate the needs of non-traditional students seeking traditional and demanding academic challenges.

The Citadel offers five undergraduate degrees with nineteen major offerings, six master's degrees in sixteen academic areas, and the specialist degree in two areas. The Corps of Cadets is a full-time residential student body functioning in a structured cadet lifestyle, and our graduate students are, in the main, practicing professionals who are employed full-time. The lifestyle of these groups requires that a great deal of learning take place in the classrooms. The Citadel, therefore, requires class attendance for all members of the Corps of Cadets and offers its degree programs through small classes taught by qualified, motivated faculty. This small student/faculty ratio of 15:1 is complemented with a variety of academic support services including full electronic access to Library holdings, extensive writing and learning strategy support, support for students with learning differences to help them become efficient and independent learners, and programming and activities designed to increase the involvement of minority students in extracurricular activities.

2. Your key student segments, stakeholder groups, and market segments, as appropriate, and their key requirements/expectations

The Citadel serves five distinct student bodies:

The Corps of Cadets-- Approximately 2000 young men and women are full-time, living on campus in barracks, and pursuing one of more than 19 undergraduate programs.

Active Duty Students—Approximately 75 young men and women who are non-commissioned officers in the Marine Corps or Navy and are pursuing one of more than 19 undergraduate majors with the Corps of Cadets. The active duty students are assigned to the Naval ROTC Detachment at The Citadel, wear uniforms while on campus, and will be commissioned as second lieutenants or ensigns upon degree completion.

Undergraduate Evening Students—Approximately 120 male and female non-traditional students are pursuing degrees in Business Administration, Civil Engineering, or Electrical Engineering through 2 + 2 programs offered jointly by The Citadel and Trident Technical College.

Graduate Students—Approximately 1000 students are pursuing one of six master’s degrees in sixteen academic areas or the specialist degree in two areas. The vast majority of these students are working adults who are pursuing these degrees as professional development.

Veteran Cadets—This program serves a limited number of cadets who have been called to active duty after beginning their studies at The Citadel and are allowed to return to The Citadel as civilian students to complete their degrees.

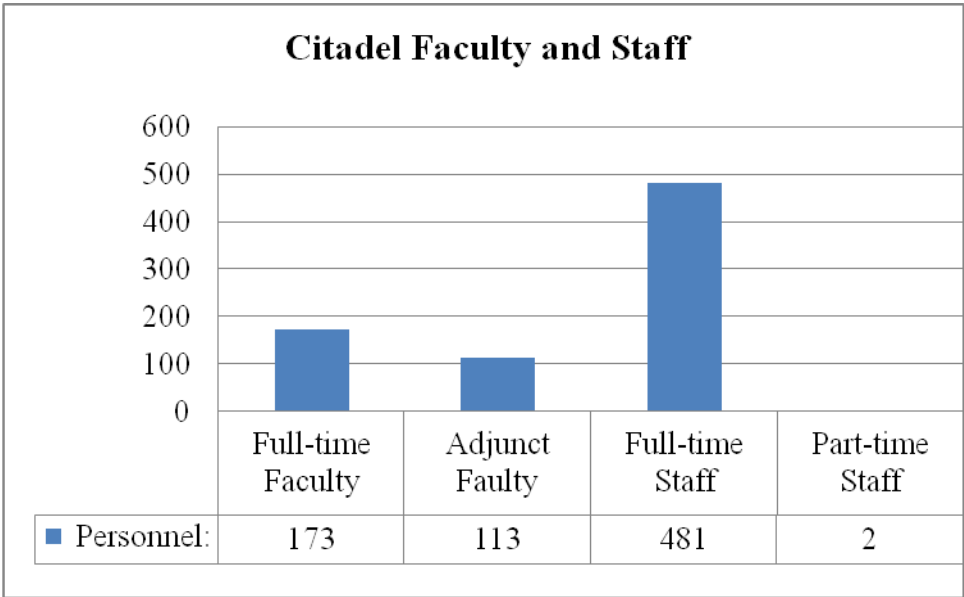
Other primary stakeholders are the parents of our students, alumni/alumnae, employers and the citizens of the Charleston area. The expectations of the students in our Corps of Cadets are an educational experience that will prepare them to take full advantage of the next phase of their lives. Most of our Active Duty, Undergraduate Evening, and Graduate Students have already chosen a career path, and their expectations deal in the main with professional development. We have designed and developed our curricula and student development programs accordingly.

3. Your operating locations

The Citadel offers all degree programs on its campus at 171 Moultrie Street in Charleston, SC. While no complete degree programs are offered, a number of graduate courses in Business Administration, Computer Science, and Education are offered at the Lowcountry Graduate Center located in the Trident Research Center, 5300 International Boulevard, North Charleston, SC.

4. The number of employees you have, segmented by faculty and staff or other appropriate categories; NOTE: “Faculty and staff” refers to your organization’s permanent, temporary, and part-time personnel, as well as any contract employees supervised by your organization. Contract staff supervised by a contractor should be addressed separately.

The composition of Citadel faculty and staff is depicted below.



5. The regulatory environment under which your organization operates.

The Citadel is a four-year state college and operates under the following agencies and accrediting bodies.

South Carolina Commission on Higher Education(CHE)

The Citadel is a state-assisted college. Degree programs are approved and monitored by the South Carolina Commission on Higher Education (CHE). Budgets are submitted through the CHE.

Commission on Colleges of the Southern Association of Colleges and Schools(SACS)

The Citadel is accredited by the Commission on Colleges of the Southern Association of Colleges and Schools to award Bachelor's, Master's, and Specialist degrees. The institution was initially accredited in 1924, was last reaffirmed in 2004, and is scheduled to receive its next reaffirmation of accreditation in 2014.

Accreditation Board for Engineering and Technology (ABET)

Civil Engineering and Electrical Engineering Programs are accredited by the Engineering Accreditation Commission (EAC) of the Accreditation Board for Engineering and Technology (ABET). The Citadel has been continuously accredited by ABET in Civil Engineering since 1936 and in Electrical Engineering since 1976. The Citadel's Computer Science programs underwent initial review in fall 2007. This was a very successful review, and full accreditation by ABET has been received retroactive to October 2006. Civil and Electrical Engineering programs were re-accredited in 2009.

National Council for Accreditation of Teacher Education (NCATE)

Programs for the preparation of secondary teachers at the bachelor's level, for the preparation of secondary and special education teachers at the master's level, for the preparation of guidance counselors at the master's and specialist degree levels, and for the preparation of school superintendents at the specialist degree level are accredited by the National Council for Accreditation of Teacher Education (NCATE). The Citadel has been continuously accredited by NCATE since 1975. The Citadel hosted a very successful NCATE reaffirmation team visit in fall 2007, and all programs in the School of Education have been granted full accreditation.

The Association to Advance Collegiate Schools of Business (AACSB)

The Citadel's programs in Business Administration, both graduate and undergraduate, are accredited by AACSB – The Association to Advance Collegiate Schools of Business. The Citadel's bachelor's and master's programs in business administration were accredited by AACSB in April 1996 and reaccredited in March 2000. The School of Business Administration continues preparation for its next accreditation visit in 2010.

National Collegiate Athletic Association and Southern Conference(NCAA)

The Citadel is a member of the NCAA Division I-AA classification in football and Division I classification in all other sports. In addition, the College is a member of the Southern Conference. The Citadel hosted a very successful NCAA reaffirmation team visit in fall 2007, and all of The Citadel's sports programs have been declared to be in full compliance with NCAA rules and regulations.

The Ed.S. in School Psychology

This program is approved by the South Carolina Department of Education. Graduates are eligible for certification at the School Psychology II level in South Carolina. The program is also accredited by the National Association of School Psychologists (NASP, 1999), the National Association of State Directors

of Teacher Education and Certification (NASDTEC, 1993) and the National Council for Accreditation of Teacher Education (NCATE, 1999).

#### The Master of Education in Counselor Education

The Council for Accreditation of Counseling and Related Educational Programs (CACREP) granted accreditation in July 2005, effective until October 31, 2013, to The Citadel's School Counseling Programs which offer a Master of Education in Counselor Education.

#### The Master of Arts in Psychology: Clinical Counseling

This program offers graduate education for those interested in becoming professional counselors in community agencies, including college counseling centers, hospitals, mental health, and social services agencies. The program requires completion of 54 credit hours of coursework, typically completed in 2-1/2 to 3-1/2 years. The curriculum has been developed according to guidelines set forth by the Council of Applied Masters Programs in Psychology (CAMPP) and the program is accredited by the Master's in Psychology Accreditation Council (MPAC). Coursework is consistent with requirements for licensure as a Professional Counselor in the state of South Carolina.

#### 6. Your governance system (the reporting relationships between your governance board/policy making body and your senior leaders, as appropriate)

The Citadel's governing board, The Citadel Board of Visitors (BOV), was established by Section 59-121 of Code of Laws of South Carolina 1976 (as amended). The policies by which the Board of Visitors governs The Citadel are presented in "College Regulations." This document and the minutes of BOV meetings are kept in the Office of the President and are posted on The Citadel webpage. The BOV is responsible for hiring the President, the Provost/Dean of the College, and all other vice presidential level administrators. The BOV holds scheduled meetings periodically throughout the calendar year and conducts its business through ten Standing Committees. Each of these committees has a senior administrator as its liaison with the College. The BOV approves statement of vision, mission, and core values for the College as well as the Strategic Plan that guides the priorities of the institution. The College provides the BOV an annual update on progress being made in addressing the Strategic Initiatives within the Strategic Plan adopted by the BOV in June 2009 for the period 2009 to 2012. Annually, the BOV provides guidance for the College through its evaluation of the President of the College and the goals provided for the coming year through the planning/budget approval process.

#### 7. Your key suppliers and partners

While The Citadel recruits and admits students nationwide, our key suppliers and partners are the public and private secondary schools in South Carolina and four surrounding states, North Carolina, Georgia, Florida, and Virginia. For example, the entering class for fall 2008 included students from 37 states and 8 foreign countries. Most of our adult students are employed full-time in the Lowcountry.

#### 8. Your key competitors.

The Citadel's key competitors are the other four-year State colleges and universities, including senior military colleges and military academies. Additional competitors for The Citadel Graduate College are the extension programs that have moved into Charleston such as the non-traditional Troy State, Webster, Springfield College, and Strayer University.



9. Your principal factors that determine your competitive success.

The Citadel's vision, core values, and mission (See Section I, item1) and the quality of our academic programs remain our strength. The Citadel's mission is to educate and prepare graduates to become principled leaders in all walks of life by instilling the core values of The Citadel in a challenging intellectual environment. Significant steps are being taken to strengthen our leadership development model to include an extensive four-year Values and Respect Program. This program begins on the very first day the new freshman class arrives on campus and continues through the senior year during which cadets assume responsibility for cadet life. The importance of developing principled leaders has never been greater, and The Citadel continues to strive for excellence in that endeavor.

10. Your performance improvement systems

In addition to the accreditation reviews described in Section II, item 5, The Citadel at present has seven continuing improvement systems.

- a) **Internal Assessment Process of the College.** Each budgeted school/department of the College presents an annual assessment report on its programs/services/activities. These reports are submitted each June to the Office of the Associate Provost for Planning, Assessment and Evaluation which is responsible for compiling these reports for the use of the Provost, Vice Presidents, and President in developing the budget and allocating the resources of the College. Each report includes the following: Mission/Purpose, Expected Results, Assessment Tools, and Assessment Results/Actions Taken/Resources Needed. Institutional Assessment and key performance indicators in the strategic plan are also important performance improvement systems.
- b) **Update on Strategic Initiatives presented quarterly to the Board of Visitors.** (See Attachment II)
- c) **Institutional Effectiveness Report to the Commission on Higher Education.** Pursuant to Section 59-101-350 of the SC Code of Laws, 1976, as amended, the CHE collects and reports on institutional effectiveness (IE) information from each of the thirty-three public institutions annually. The report is submitted to the General Assembly each January and made available to each institution and the public. The information regarding institutional effectiveness reporting required by Section 59-101-350 includes specific metrics in thirteen different areas.
- d) **South Carolina's Performance Funding System for Higher Education.** Act 359 of 1996, commonly referred to as the "Performance Funding Legislation," requires that State colleges and universities be evaluated in the following areas: Mission Focus (three specific areas), Quality of Faculty (three specific areas), Classroom Quality (seven specific areas), Institutional Cooperation and Collaboration, Entrance Requirements (five specific areas), Graduates' Achievements (10 specific areas), User-Friendliness of the Institution (eight specific areas), and Research Funding (three areas).
- e) **The State Budget and Control Board Higher Education Accountability Report.** This is the third year that State colleges and universities have been required to participate in this process. It is expected that this will become another important assessment process for The Citadel.
- f) **The President's Dashboard.** The Dashboard is updated quarterly and is available on The Citadel's webpage at [http://www.citadel.edu/instresearch/dashboard/dashboard\\_june09.htm](http://www.citadel.edu/instresearch/dashboard/dashboard_june09.htm)
- g) **Quarterly Reports to the President by each Vice Presidential Level Position.**

12. Organizational structure

The Citadel's Organizational Chart is included in landscape format as the first document after the body of the report.

13. Your **Expenditures/Appropriations Chart**---See Attachment V.

14. Your **Major Program Areas Chart**---See Attachment VI.

## **SECTION III – Elements of Malcolm Baldrige Award Criteria**

### **Category 1 – Senior Leadership, Governance, and Social Responsibility**

The Leadership Category examines how your organization's senior leaders guide and sustain your organization. It also examines your organization's governance and how your organization addresses its ethical, legal, and community responsibilities.

1. How do senior leaders develop and deploy their organization's vision and values throughout the leadership system, to all faculty and staff, to key suppliers and partners, and to students and stakeholders, as appropriate? How do their personal actions reflect a commitment to the organizational values?

The Citadel develops and refines its mission and vision through the strategic planning process. The Citadel implemented a new strategic planning process this year as described in Category 2 below. Through this process, the College re-affirmed statements of vision, mission, and core values, and the senior leadership of the College decided to place these statements in all classrooms and on bulletin boards in the academic, administrative, and cadet areas as constant reminders to students, faculty, and staff of the principles by which The Citadel is committed to operate. The vision statement – Excellence in the education of principled leaders – appears on the home page of the web site and in college-wide publications produced by the VP for External Affairs whose publications go primarily to external audiences – alumni, donors, parents, prospective students, and officials. These values and vision is also communicated through the plan itself.

Over the past year, members of the Senior Staff of the College (Provost, Vice Presidential Level Administrators, Executive Director of the Citadel Foundation, Deans, and representatives of specified organizations), under the guidance of President Rosa, made significant strides in refining the planning and evaluation processes of the College, culminating in the development of The Citadel's new strategic plan. In the initial phase of this effort, each vice presidential level position provided the metrics/expected results most critical in determining the level of success of those operations for which he/she is responsible. Through an extensive process of discussion and refinement, a collection of metrics for the College has been developed and is presented in the Dashboard, that is available on The Citadel webpage at [http://www.citadel.edu/instresearch/dashboard/dashboard\\_june09.htm](http://www.citadel.edu/instresearch/dashboard/dashboard_june09.htm). Each vice presidential level position presents to the President and Senior Staff a quarterly report on the metrics most critical to those areas for which he/she is responsible.

The Citadel Staff Council has adopted an employee code of ethics that sets forth expectations of all employees in view of The Citadel's mission. The Citadel Faculty Council has also adopted a code of ethics that embraces The Citadel's mission in an academic context. Senior leaders have regular meetings with the heads of the departments/operations under their supervision. These meetings provide the forum for discussions of mission, vision, and values as well as day to day operational and budgetary issues.

2. How do senior leaders create a sustainable organization with a focus on action to accomplish the organization's strategic objectives, improve performance, and attain your vision?

The Senior Staff of the College (Provost, Vice Presidential Level Administrators, Executive Assistant to the President, Executive Director of the Citadel Foundation, General Counsel for the College, and

representatives of specified organizations) meet weekly to share ideas, address issues, and plan for coming events. This group then meets with the President to ensure that he is aware of pertinent matters and activities. Each vice president periodically briefs his department/operational leaders on key performance measures in his/her areas of responsibility.

3. How do senior leaders personally promote and support an organizational environment that fosters and requires: legal and ethical behavior; and, fiscal, legal, and regulatory accountability? How are these monitored?

The Citadel provides annually workshops and briefings on such legal and ethical issues as sexual harassment, sexual assault, FERPA regulations, state and federal guidelines for fiscal and regulatory accountability. Institutional, state, and federal regulations regarding purchases, travel, per diem, etc. are strictly enforced. The Citadel has established two ombudspersons to facilitate the reporting of illegal or unethical behavior. Internal and external audits are conducted regularly to ensure that the institution is in compliance with all regulations. Our communications on issues relating to legal matters that go to either the Board of Visitors or the news media are reviewed by the college attorney to ensure that we are protecting the privacy rights of our students while still following our ethical obligation to provide accurate and timely information.

4. How do senior leaders create an environment for organizational and workforce learning?

Senior Leaders set the example for those in their areas by continuing to grow professionally themselves. They are active members of the primary professional organizations for their areas. They encourage members of their staffs to do the same. Funding is provided for professional development activities. Salary adjustments are made for completion of appropriate courses or programs. External funding is obtained for faculty development. The Provost is developing an internal program for professional development of faculty members who are interested in pursuing administrative positions as department head, dean, and provost.

5. How do senior leaders promote and personally participate in succession planning and the development of future organizational leaders?

The Citadel is a chain-of-command organization in its administration and the process of preparing subordinates to step-in when directors are away is a systematic way to groom staff members to accept higher positions.

The Provost is developing a process for supporting members of the faculty who wish to prepare themselves for administrative positions as department heads, deans, and provost.

6. How do senior leaders communicate with, engage, empower, and motivate the entire workforce throughout the organization? How do senior leaders take an active role in reward and recognition processes to reinforce high performance throughout the organization?

HR has a plan for compensation bonuses for times when employees have filled in for others, done an extraordinary job, completed an advanced degree, or acquired additional responsibilities or skills. The quarterly and annual employee recognition programs highlight employees who serve others above and beyond the requirements of their jobs.

7. How does your organization evaluate the performance of your senior leaders including the head of the organization, and the governance board/policy making body? How do senior leaders use these performance reviews to improve their own leadership effectiveness and that of the board and leadership system, as appropriate?

The senior leaders—Provost and vice presidential level administrators—are evaluated annually by the President. The BOV evaluates the President annually. There is no formal evaluation of the governing board of the College. The deans of the five schools are evaluated by their faculty and department heads and by the Provost. Individuals are required to provide plans for addressing any concerns identified in the evaluation processes.

8. What performance measures do senior leaders regularly review to inform them on needed actions?

Over the past three years, the Senior Staff of the College (Provost, Vice Presidential Level Administrators, Executive Assistant to the President, Executive Director of the Citadel Foundation, General Counsel for the College, and representatives of specified organizations), under the guidance of President Rosa, has made significant strides in refining the planning and evaluation processes of the College. In the initial phase of this effort, each vice presidential level position provided the metrics/expected results most critical in determining the level of success of those operations for which he/she is responsible. Through an extensive process of discussion and refinement, a collection of metrics for the College has been developed and is presented in the Dashboard, that is available on The Citadel webpage at [http://www.citadel.edu/instresearch/dashboard/dashboard\\_june09.htm](http://www.citadel.edu/instresearch/dashboard/dashboard_june09.htm). Each vice presidential level position presents to the President and Senior Staff a quarterly report on the metrics most critical to those areas for which he/she is responsible. The Provost holds a meeting with his deans each week. This provides a forum for discussion of important issues facing the academic programs of the College.

9. How does your organization address and anticipate any adverse impacts of its programs, offerings, services, and operations? What are the key compliance related processes, goals, and measures? (Actual results should be reported in Category 7).

During the 2008-2009 academic year, The Citadel employed a full-time internal auditor who reports to the Office of the President. There are annual audits of financial records by State approved external auditors. Every individual at The Citadel is evaluated each year. These processes provide for an opportunity for each individual to meet with his/her evaluator, and this step provides the opportunity for concerns and issues to surface. The expectations of the College are that all such audits and reviews will provide no negative findings. The strategic planning process for the College begins with a SWOT assessment, the results of which are reviewed periodically (see Category 2). The institution also participates in the Chronicle of Higher Education's Great Colleges to Work For Program, which administers a yearly social climate survey.

10. How do senior leaders actively support and strengthen the communities in which your organization operates? Include how senior leaders determine areas of emphasis for organizational involvement and support, and how senior leaders, the workforce, and the organization's students contribute to improving these communities.

Members of the senior leadership are actively involved in local civic clubs and churches. Community service is emphasized in our leadership development programs. The Citadel plays a significant role in community service in the Lowcountry in a variety of ways. The Corps of Cadets has received national

recognition for its community service efforts. The Citadel is a charter member of the Lowcountry Graduate Center which focuses on the educational needs of the Lowcountry. The Citadel has been a long time supporter of United Way, and the leadership of the College play active roles in this program each year. The addition of a new strategic planning initiative to “provide outreach to the region and serve as a resource in its economic development” underscores this commitment.

The Schools of Education, Engineering, and Science and Mathematics are working together to develop a partnership with the Charleston County School District to establish a STEM (Science, Technology, Engineering, and Mathematics) Educational Center at The Citadel, and these schools are also developing a partnership with the Charleston County School District (CCSD) and the Charleston Metropolitan Chamber of Commerce to conceptualize and create a “high tech high school.” The School of Education is transforming the GEAR UP and Wachovia Reading Literacy projects into a more sustainable partnership with the Charleston County School District. The School of Education maintains an active partnership with the Charleston County School District to offer master's program in educational leadership to a cohort of area teachers with leadership aspirations.

## **Category 2 – Strategic Planning**

### **1. What is your Strategic Planning process, including key participants?**

During the 2008-2009 academic year, The Citadel significantly modified the strategic planning process that has been in place since the 1980s. In Summer 2008, the President and his Senior Staff held an “off-site” planning session with the following four outcomes:

#### **Discussion of Objectives for the Off-Site Planning Session**

- Develop consensus on overall strategic planning process and related processes (e.g. planning horizons, annual strategic planning timeline, and implementation steps).
- Review Strategic Initiatives and update annual objectives and action steps.
- Improve “teamwork” culture among senior staff, The Citadel Foundation/The Citadel Brigadier Foundation/Citadel Alumni Association, and Board of Visitors.

#### **Implementation of a Strategic Planning Working Group (SPWG)**

Provost (Chair); Chairman, BOV Strategic Planning Committee (ex officio); Chief of Staff; Assoc. Provost for Planning (Staff support); VP for Business and Finance; VP for External Affairs; VP for Facilities and Engineering; Commandant of Cadets; Executive Director of TCF; Chairman, Faculty Council; Chairman, Staff Council; Representation from the Academic Board

#### **Discussion of Strategic Planning Horizons**

The centerpiece of our strategic planning efforts is the ongoing design, development, and implementation of our “strategic initiatives.” The strategic initiatives guide our work over the annual operating, three year, five year planning processes and are informed by our long-range vision for The Citadel in 2042, our Bicentennial Year. Strategic planning encompasses several planning “horizons” that roll from one year to the next: one-year operating plans; three-year academic plans based on strategic initiative plans; five-year strategic financial plan; ten year facilities plans.

## **Completion of an Off Site SWOT Analysis**

**The factors identified in the 2008 Off Site SWOT Analysis are listed below.**

**STRENGTHS:** Senior leadership team members; Key components for effective strategic, long-range, and operational planning exist; Clarity of and consensus re: mission and core values; Competitive salary structure for faculty and staff (periodic salary review in place); Strong support from TCF through Academic Enhancement Grant with potential for growth; Strong and supportive alumni base; Potential of Leadership Development model and Values & Respect Program; Strong alumni network and career planning programs help place graduates into professional opportunities; Assessment plans for academic programs are in place; Johnson Hagood Stadium renovation and potential of football team likely to increase revenues; Plan for integrating management of rental facilities at market rates to increase revenues; Endowment per student in top 15 of Carnegie Classification public colleges & universities; Capacity to grow SCCC to 2135 over next several years (increase revenues); Potential to grow CGC to meet community needs and increase revenues.

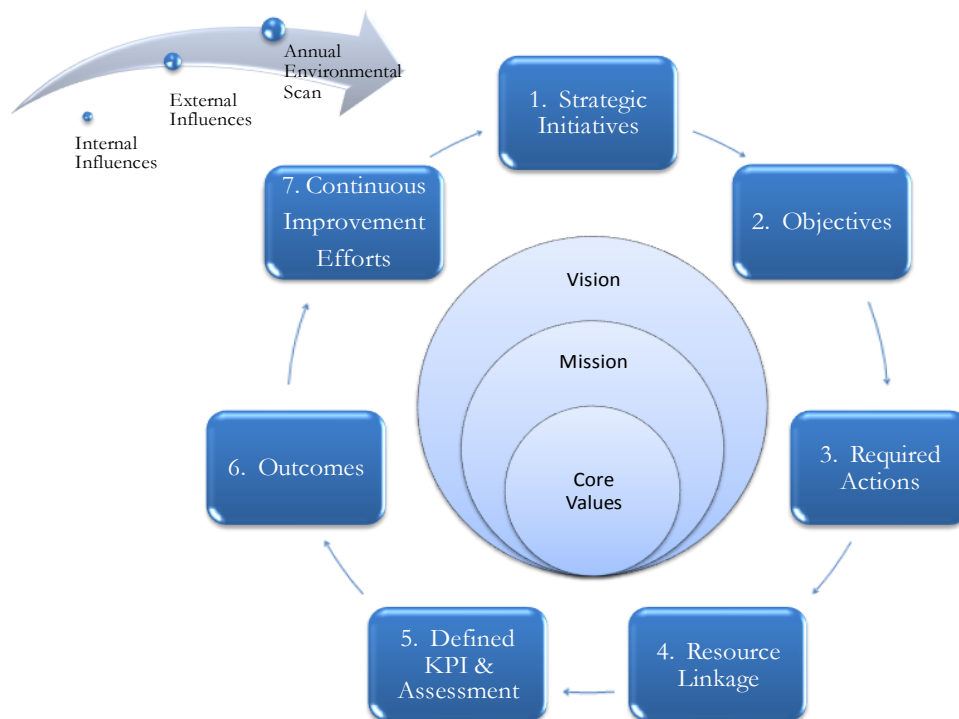
**WEAKNESSES:** Strategic planning and other planning processes not fully established and integrated; Staff is “one deep and a mile wide”; Limited bonding capacity until 2017; Need for new ERP and increased capacity in IT; Deteriorating physical plant (e.g., Capers Hall) and backlog of deferred maintenance; Student body in SCCC still underrepresented in women and minorities; Desired culture change in SCCC not yet achieved; Auxiliary enterprises not realizing full potential to generate revenues; Lack of “entrepreneurial culture” among staff and faculty; Lack of Grants Administration Office to increase number of proposals for external funding; Data driven decision-making not fully developed in all areas; Budgets (state and foundation) not adequate to fund “excellence” in all needed areas; Discretionary resources over dedicated to the support of athletics and not to meet other needs.

**OPPORTUNITIES:** Sustain high rankings in US News & World Report and seek other external validations of The Citadel experience; Moderate “buyers market” for faculty & staff; Capacity to build on strong “brand” with name recognition and positive image; Potential for building marketing niche as the South’s Leadership University; Increased levels of philanthropic giving nationwide; Increased levels of alumni participation in giving possible; Federal funding for specific projects and academic programs (e.g., DOD, US Department of Education, FIPSE); Feasibility study completed for next capital campaign (\$150-225 million over 7 years); Strong supportive base in SC General Assembly; Support from Charleston County Council; Support from City of Charleston; Cooperative ventures of CGC with College of Charleston and LGC to grow academic programs and increase revenue stream; Potential market for growing undergraduate 2+2 programs (possibly at LGC); Potential to engage local business community and other agencies in conducting research, training, and contract work; Geopolitical environment (e.g., US foreign policy; foreign threats); Increased scholarship opportunities from US armed forces (especially US Army).

## **Launch of New Strategic Planning Process**

In September 2008, The Citadel launched a new strategic planning process, depicted in the diagram below. A strategic planning website was launched (<http://www.citadel.edu/strategic-planning/>) and strategic planning folders with environmental scans, SWOT analyses, and proposal forms were distributed to every member of The Citadel’s faculty and staff. In December 2008, we received strategic planning proposals from campus-wide constituencies, including proposals for two new strategic

initiatives, 105 new objectives and 314 new actions. After carefully setting priorities, the Strategic Planning Working Group narrowed these proposals down to 8 strategic initiatives and 30 new objectives that best represent the stature and prominence we desire for The Citadel of the future.



How does the Strategic Planning Process address:

a. Your organizations' strengths, weaknesses, opportunities and threats

The first step in the strategic planning process is to conduct a SWOT assessment. See the results for the SWOT Analysis conducted during the 2008 Off-Site described in the description of the planning process above.

b. Financial, regulatory, and other potential risks

The Vice President for Finance and Business Affairs serves on the Strategic Planning Working Group and is responsible for monitoring financial and regulatory issues that might influence the strategic planning process and the implementation of the strategic plan. The institution's SWOT analysis is also designed to capture potential risks.

c. Shifts in technology, student and community demographics, markets, and competition

The second component of the institution's strategic planning process is the completion of an Environmental Scan which analyses technology trends, student and community demographics, competition, faculty and staff hiring trends, and economic forces. The institution also maintains an active membership in the Society for College and University Planning (SCUP) which provides a quarterly analysis on trends in higher education.

The Recruiting Process for the Corps of Cadets is monitored through weekly reports that provide a continuing analysis of the potential size, quality, and composition of the incoming class. The projected size of the entering class is based on a model that includes the impact of fall to fall attrition by class with data from the past five academic years.

The Citadel Graduate College assumes primary responsibility for monitoring the academic needs of the Lowcountry community that might impact the College. The following characteristics are monitored annually and compiled for longitudinal studies: race, age, sex, education level, growth rate of population over 25 years of age, employment rate, new job growth, employment by sector, employment by local county and type of business, and income. Data is also collected on the advertising media that are most attractive to our students.

d. workforce capabilities and needs;

The Provost develops a faculty recruitment plan each year. Through this action, deans and department heads are presented the task of projecting and justifying their short-term (next academic year) and long-term (projected 3- to 5-year needs). These need projections include permanent faculty, visiting faculty, and part-time adjunct faculty. Based on these projects, the Provost develops the recruiting budget for the coming year. Other vice presidents develop similar personnel needs assessments that are presented as part of the annual budgeting process.

e. Long-term organizational sustainability and organizational continuity in emergencies.

The senior staff of the College meets each Monday in preparation for a weekly meeting with the President. These Monday meetings are chaired by the Provost/Dean of the College and include all vice presidential-level administrators as well as representatives of key areas of the College. These meetings provide regular, face-to-face exchanges between those members of the staff who must assume most responsibility for implementing the strategic plan and assessing the continuing credibility of the strategic plan. The Citadel has developed extensive, detailed disaster plans that are reviewed periodically. For example, The Citadel's Hurricane Disaster Plan is available on the College's webpage.

f. Your ability to execute the strategic plan

Full implementation of the strategic plan is dependent upon securing funding from private donors through partnerships with The Citadel Foundation. The Strategic Planning Working Group (formerly the Strategic Planning Council) has specific responsibility for monitoring the implementation of the strategic plan of the College. Its composition is specifically designed to ensure that major internal components of the college are represented. This ensures that the implementation of the strategic plan is broadly monitored.

2. How do your strategic objectives address the strategic challenges you identified in your Executive Summary? (Section I, Question 4).

The Citadel has identified the following as barriers and has attempted to address these through budget requests and fundraising efforts:

- Annual State appropriations levels
  - Does not cover HEPI annual inflation
    - Recruitment and retention of quality faculty and staff
    - Construction costs
    - Contracting costs
    - Energy costs
- Lack of State funded capital financing



- Lack of a bond bill in recent years
- Inadequate need based scholarship funds
- Deferred maintenance deficits mounting (\$69 million)
- \$7.8M in FY08/09 unfunded requirements

The Citadel Board of Visitors, our governing board, approved the strategic plan in June 2009. The following Strategic Initiatives were revised as follows in the new strategic plan.

- A. Develop Principled Leaders in a Globalized Environment.
- B. Strengthen the College through Institutional Advancement.
- C. Enhance the Learning Environment.
- D. Develop the Student Population.
- E. Enhance the Facilities and Technological Support for the Campus.
- F. Improve Institutional Effectiveness.
- G. Ensure the College has the Leadership and Talent to accomplish these Strategic Initiatives.
- H. Provide Outreach to the Region and Serve as a Resource in its Economic Development.

Strategic Initiatives B, D, E, and F address identified barriers to success. The other Strategic Initiatives are directed toward enhancing strengths of the College

### 3. How do you evaluate and improve your strategic planning process?

The strategic planning process (depicted above) is a circular, continuous process with purposely designed linkages to assessment, budget, key performance indicators, and continuous improvement processes. The BOV is provided quarterly reviews of the Strategic Plan, and the Strategic Planning Working Group monitors the progress toward addressing these initiatives as well as their continuing relevance. The latest assessment report on these strategic initiatives is included as Attachment II. Taskstream accountability management software was purchased in 2009 and will be implemented during the 2009-2010 academic year, enhancing the institutions ability to track progress on strategic planning initiatives.

### 4. How do you develop and track action plans that address your key strategic objectives? Include how you allocate resources to ensure the accomplishment of your action plans.

As part of the strategic planning process, concrete and detailed action plans and budget requirements are linked to every objective. The BOV is provided quarterly reviews of the Strategic Plan, and the Strategic Planning Working Group monitors the progress toward addressing these initiatives as well as their continuing relevance. Progress is also discussed during month Vice President meetings. Taskstream accountability management software was purchased in 2009 and will be implemented during the 2009-2010 academic year, enhancing the institutions ability to track progress on strategic planning initiatives.

### 5. How do you communicate and deploy your strategic objectives, action plans and related performance measures?

The new Strategic Plan is communicated through a wide variety of mechanisms, including a printed version (See Attachment III), strategic planning website, and through communication cards. The plan is also communicated through targeted emails, town halls, and Citadel website announcements. Each member of the Senior Staff is responsible for keeping his/her areas of responsibility focused on how the strategic initiatives can be and are being addressed.

6. How do you measure progress on your action plans?

The BOV is provided quarterly reviews of the Strategic Plan, and the Strategic Planning Working Group monitors the progress toward addressing these initiatives as well as their continuing relevance. Progress is also discussed during month Vice President meetings. Taskstream accountability management software was purchased in 2009 and will be implemented during the 2009-2010 academic year, enhancing the institutions ability to track progress on strategic planning initiatives.

7. If the organization's strategic plan is available to the public through the organization's internet homepage, please provide an address for that plan on the website.

The Citadel's Strategic Planning Website can be located at: <http://www.citadel.edu/blueprint/>

**Category 3 – Student, Stakeholder, and Market Focus**

1. How do you identify the student and market segments your educational programs will address? How do you determine which student and market segments to pursue for current and future educational programs, offerings, and services?

Typically, over 50% of each entering cadet class initially identify themselves as interested in The Citadel in our first contact with them. They have already determined that we offer something that they want. Approximately 25% of the class results from mailings to students identified through national vendors. We purchase names from a number of vendors (College Board, ETS, College Bound Selection Service, and National Research Center for College University Admissions). Each vendor has different information available on the students in their data files. We select names to purchase based on a selection of variables including interest in military colleges, ROTC programs, and majors that we offer. We also select from geographical areas that have been good markets. The remainder of the class is made up of students identified through other sources such as college fairs, participants at programs held on campus, or other indicators of potential interest such as Boys'/Girls' State, the Hugh O'Brien Leadership Conference, etc. Graduate and evening programs are developed and offered to meet the educational needs of the Lowcountry in cooperation with the College of Charleston.

Another critically important component of our recruiting process is The Citadel Volunteer (CV) Program, formerly known as the Cadet Procurement Program (CAPP). This organization was founded in 1973, and its mission, under the guidance of the Citadel Alumni Association and the Admissions Office, is to identify prospects and then recruit and assist qualified high school students through the matriculation process. Well over 300 alumni serve as Citadel Volunteers. The Citadel has compiled a list of 1064 high schools from 45 states from which at least 1 student has matriculated in the past 3 years. The Citadel Volunteers have initiated an Adopt a High School Program with the specific goal of covering at least 25% of these "Feeder High Schools."

The Citadel surveys the parents of matriculating cadets each fall. Through these surveys, we evaluate the services provided by Admissions, Financial Aid, Registrar, and Treasurer and receive specific suggestions for improving the Parents' Orientation in general. These ratings and suggestions are provided to the individual operations and the responsible vice president for action.

2. How do you keep your listening and learning methods current with changing student and stakeholder needs and expectations (including educational programs, offerings, and service features)? How do you determine the relative importance of the expectations to these groups' decisions related to enrollment?

The Citadel administers a number of program-specific surveys. For example, Schools of Engineering, Business Administration, and Education all use alumni surveys as parts of their accreditation reviews. The Citadel also uses survey instruments to gather information from students, alumni, and parents.

- **Student Evaluation of Instruction** is administered in each section of each course offered to provide information and the quality of our teaching and effectiveness of our courses. These evaluations include specific questions that are addressed in each section as well as questions for specific courses, sequences, or subsets of the curriculum.
- **Citadel Experience Survey** is completed by each graduating cadet and addresses components of the curriculum, aspects of cadet life, and each student's plans for the future. Open ended opportunities are provide to encourage students to share suggestions, criticisms, and observations.
- **Alumni Survey** is administered bi-annually and consists of questions prescribed by the CHE and questions designed to determine alumni satisfaction with their Citadel educational experience. This survey was administered in fall 2008 to graduates from the AY 2004-2005.
- **National Survey of Student Engagement (NSSE) and Faculty Survey of Student Engagement (FSSE)** are administered each spring and contribute to our assessment of academic programs.
- **Cooperative Institutional Research Program (CIRP)** is administered to each entering freshman cadet and covers a wide range of student characteristics: parental income and education, ethnicity, and other demographic items; financial aid; secondary school achievement and activities; educational and career plans; and values, attitudes, beliefs, and self-concept.
- **Parents of Matriculating Cadets** are surveyed each fall as part of our efforts to assess the effectiveness and quality of our parents' orientation and the services we provide in our recruiting/admission process.

3. How do you use information and feedback from current, former, and future students and stakeholders to keep services and programs relevant, and provide for continuous improvement?

The results of the surveys listed in item 2 are shared with the Office of the President, the Provost/Dean of the College, each vice presidential-level administrator, each academic dean/department head, and the directors of each operation mentioned in the survey.

The CGC has established an Alumni Round Table consisting of distinguished alumni who meet monthly to participate in the CGC strategic planning processes. They provide information on alumni needs, contact to alumni in the community, and, because of their positions in the community, a business perspective for planning. The CGC Student Government Association is very active and provides valuable insights to student interests and needs.

4. How do you determine student and stakeholder satisfaction and dissatisfaction and use this information to improve?

See descriptions of surveys in items 2 and 3. Follow-up surveys are reviewed to determine if concerns and issues persist.

5. How do you build positive relationships to attract and retain students and stakeholders, to enhance student performance, and to meet and exceed their expectations for learning? Indicate any key distinctions between different student and stakeholder groups.

Positive relationships are built with prospective members of the Corps of Cadets and their families in the following ways:

- **U.S. Mail.** Prospective students and applicants receive an extensive series of letters from various members of the campus community. These personalized letters encourage the students' interest and congratulate them when they receive academic acceptance. Letters from the Office of Admissions also provide students with valuable information regarding The Citadel and the admissions process.
- **Telecounseling.** Approximately 20 trained cadets attempt 15,000-16,000 phone calls each year to prospective students and applicants. The telecounseling program allows cadets to answer questions about the cadet lifestyle while also advising students how to proceed through the admissions process efficiently.
- **E-mail.** Prospective students and applicants receive a regular, personalized electronic newsletter called *Dawg E-Bites* from the Office of Admissions. These messages contain the subtitle "This Week At The Citadel" and are in the form of short narratives, with accompanying pictures, that depict life at The Citadel.
- **Citadel Volunteers.** Originally called the Cadet-Alumni Procurement Program (CAPP) when it was created in 1973, the Citadel Volunteers (CV) Program, allows trained alumni to represent The Citadel at college/career fairs across the country. The 400-450 alumni who participate in this program can potentially speak to thousands of prospective students and applicants each year.
- **Citadel Family Association.** Created in 1993, the Citadel Family Association (CFA) is a group to which all cadet parents/guardians belong. Representatives of the CFA are present at each Pre-Knob (overnight visitation) Program for the purpose of meeting, and answering questions from, the parents of the academically-accepted students participating in the Pre-Knob Program.

The Dean of CGC has established open email communication with registered students. The CGC web site is user-friendly and information packed. The Student Government site provides services, a discussion forum, and current information about textbooks, classes, and services. Student surveys have consistently reported high satisfaction with the academic quality of CGC classes and instructors. Also, CGC has a series of open houses to discuss programs with prospective students.

Communication with our Active Duty Students is accomplished in the main through the respective ROTC Detachments.

6. How does your student and stakeholder complaint management process ensure that complaints are resolved promptly and effectively?

The institution's complaint management process is closely linked with institutional published guidelines and regulations to ensure prompt and effective resolution. Published guidance and processes are in place to facilitate a variety of complaints including grade appeals and admission appeals. Two ombudsmen are also available to help facilitate effective resolution of any complaints.

## **Category 4 – Measurement, Analysis, and Knowledge Management**

1. How do you select which operations, processes, and systems to measure to determine student learning, and for tracking daily operations and overall organizational performance, including progress relative to strategic objectives and action plans?

The operations, processes, and systems to measure/determine student learning are selected by the academic schools and departments and include administering standardized tests, embedding selected questions in tests and exams, developing student portfolios, student surveys, and capstone courses. Annual Assessment Reports are available on The Citadel website.

Under the guidance of the President, a limited, well defined collection of key indicators/metrics has been developed by the Senior Staff of the College. These key indicators must be sufficiently broad to forecast the health of the College and its success in accomplishing its mission, while sufficiently focused to be manageable and useful. These metrics are updated quarterly and presented in the Dashboard on The Citadel webpage. In addition, each vice president presents a quarterly report addressing specific aspects of his responsibilities with appropriate metrics. Since the adoption of the Strategic Initiatives, the College has measured its performance by how well and extensively the actions taken by the various operations/departments have addressed these initiatives. The report on the revised initiatives adopted in September 2006 is included as Attachment II at the end of this document. At present, the Annual Student Surveys, the Annual Assessment Reports, the Status Report on Strategic Initiatives, the annually prepared Fact Book, quarterly reports from each vice presidential level position, and the President's Dashboard presentation of specific performance metrics are the primary tools by which the College monitors action plans and their progress.

2. How do you select, collect, align, and integrate data/information for analysis to provide effective support for decision making and innovation throughout your organization?

The primary source of data/information for the College is the Office of Institutional Research. Each year that operation provides CHEMIS data for the SC Commission on Higher Education and develops The Citadel Fact Book, the Common Data Set, Student Profiles, and the President's Dashboard presentation of specific performance metrics. The Office of Institutional Research also administers numerous surveys throughout the year that provide data for decision-making.

3. How do you keep your measures current with educational service needs and directions?

Because cadet life plays such an essential role in The Citadel educational experience, The Citadel Experience Surveys are administered each spring to the graduating cadet class. This survey covers all aspects of our educational experience including academic programs, academic administrative services, cadet/barracks life, administrative services, etc. Our students' academic performance and retention rates are also monitored closely. The Social Climate Survey is administered to the entire Corps of Cadets every other year. In addition, alumni surveys are administered on a regular cycle. Moreover, the institution also completes benchmark comparisons each year, to assess our current outcomes and spending in the context of other higher education peer institutions.

4. How do you select and use key comparative data and information from within and outside the academic community to support operational and strategic decision making?

The Citadel completes benchmark comparisons each year, to assess our current outcomes and spending in the context of other higher education peer institutions. We also monitor such metrics as standardized test scores and high school grade point ratios to track the relative quality of the students we are attracting. We monitor the academic performance of our students to track how prepared our admitted students are to master the academic programs we offer. This helps us determine appropriate academic support services. Graduation and retention are also important measures of the success of our students. Fund raising is a measure not just of our financial stability, but also of continuing alumni support and the external reputation of the College. These are among the primary factors that feed our planning and decision making processes.

5. How do you make needed data and information available? How do you make them accessible to your workforce, students and stakeholders?

The Citadel utilizes a wide array of techniques to provide employees, students and stakeholders with information. The Citadel's External Affairs Office provides daily updates on important topics in the news. Information Technology Services also provides a daily bulletin, Phoebe, to all campus employees. In addition, the College's internal portal is comprised of multiple information channels that "push" information to campus stakeholders. Scheduled town halls, faculty meetings, and department meetings also provide important communication pathways. Academic catalogs, faculty manuals, and student regulations also communicate important information.

The Citadel's website provides a wealth of information to the workforce, students and stakeholders. While all college web-pages are designed to communicate information, several sites are particularly data-rich. The Human Resources page maintains an accessible collection of college policies and regulations. The Office of Institutional Research maintains a page accessible to the public with the most current data needed for decision-making purposes. The strategic planning page communicates information and provides a pathway for involvement. The Commandant's Office provides daily training schedules for students.

During the 2008-2009 strategic planning process, campus stakeholders identified the need to automate and increase stakeholder access to strategic planning and assessment data throughout the campus community. As a result, the objective to automate strategic planning, assessment and accreditation data was added to The Citadel's Strategic Plan. Taskstream Accountability Management Software was purchased in 2009 and will be implemented during the 2009-2010 academic year, increasing access to continuous improvement data throughout campus.

6. How do you ensure data integrity, timeliness, accuracy, security and availability for decision making?

Whenever practical, decisions are based on trend data and not on one-time information. For example, the model on which the appropriate size for the incoming freshman class is based includes data from the past 9 entering classes, fall to fall attrition data by class, readmission data, and readmission retention data. The Office of Institutional Research is the primary source of data for college-wide decision making. (See Item 1.) The institutional assessment plan coordinates the wide array of survey administrations each year to ensure data is available for decision-making purposes.

7. How do you translate organizational performance review findings into priorities for continuous improvement?

Results of the various assessment efforts of the College are shared with the Office of the President, the Provost/Dean of the College, the vice presidential-level administrators, the academic deans, and directors of the various operations included in assessment instruments. These findings are used in the annual budget development process. Individual personnel evaluations result in merit ratings on which merit salary increases are based.

8. How do you collect, transfer, and maintain organizational and employee knowledge (knowledge assets)? How do you identify and share best practices?

The Citadel has developed a number of processes and documents for preserving institutional knowledge. Primary among them is the information presented on The Citadel webpage. Most operations have developed departmental web pages through which pertinent information is preserved and made widely available. We welcome a visit to [www.citadel.edu](http://www.citadel.edu) to see the volume of employee knowledge being preserved through this medium.

A number of operations must continue to depend on the documentation developed by individual employees. The software systems developed by Information Technology Services and Human Resources are typical examples. Individual employees are expected to document the programs and processes they develop so that someone else could take over their maintenance and improvements. Academic policies and practices are documented in undergraduate and graduate catalogues that are available both electronically and in hardcopy. Standing committees of the faculty present annual reports that are shared through The Citadel webpage, and the Faculty Manual is updated periodically.

### **Category 5 – Workforce Focus**

1. How do you organize and manage work to enable your workforce to develop and utilize their full potential, aligned with the organization's objectives, strategies, and action plans and promote cooperation, initiative, empowerment, innovation, and your organizational culture?

The primary function of The Citadel Teacher-Scholar is effective teaching. Each faculty member is normally scheduled for 12 semester hours or 14 contact hours of lectures and labs (normally representing no more than three separate preparations.) The normal teaching load allows for faculty involvement in student consultations and mentorships along with some scholarly activity. The College's reluctance to increase teaching assignments through overloads evolves from a desire to encourage out-of-class student contacts along with scholarship, professional activities, and service to the College and community. The normal teaching load is nine (9) credit hours when one or more graduate courses are assigned. Faculty positions carrying administrative responsibilities warrant a one or two course teaching load reduction. The Citadel provides Faculty Development Funds through an annual award from The Citadel Foundation. A standing committee of the Faculty evaluates proposals and makes recommendations to the Provost.

For each staff position, there is a Position Description that describes the expectations of the position. The Faculty Council and the Staff Council serve as forums for discussion of faculty and staff development issues.

2. How do you achieve effective communication and knowledge/skill/best practice sharing across departments, jobs, and locations?

Faculty and staff initiatives are encouraged and recognized. Working groups such as the SIS Team and Banner Implementation teams bring functional users and ITS staff together to work on issues related to

the administrative software packages. This coalition of staff assumes “ownership” for the components of this administrative tool of the College. This approach is repeated in a variety of operational areas of the College.

Standing and ad hoc faculty committees enable faculty from a variety of academic disciplines to come together to address issues or challenges facing the College. For example, the Committee on Evaluation of Instruction has been established to address all facets of this matter, and the Faculty Computer Advisory Committee ensures that the technology needs of our students and faculty are being met.

Sharing of best practices is encouraged at all levels from presidential staff meetings to daily conversations between colleagues. The faculty has established two standing discussion groups, Communication Across the Curriculum and The Citadel Academy for Scholarship, Teaching, Learning, and Evaluation. Through regular meetings of these groups, best practices in teaching and learning and their scholarship are shared. Many of the institutional policies and procedures are preserved through General and Special Orders that are available on the webpage.

3. How does your workforce performance management system, including feedback to and from individual members of the workforce, support high performance work and contribute to the achievement of your action plans?

The faculty evaluation system and the staff EPMS system provide for opportunities for feedback and support high performance work. The merit system provides graduated merit ratings for higher level performance.

4. How do you accomplish effective succession planning? How do you manage effective career progression for your entire workforce throughout the organization?

Positions are filled through formal searches, and members of the faculty and staff, as appropriate, are encouraged to apply for and pursue these positions. Members of the faculty are provided opportunities to assume leadership positions through the Faculty Council and various accreditation reviews. Members of the staff have comparable leadership development opportunities through the Staff Council and assumption of duties in the absence of directors.

5. How does your development and learning system for the workforce (leaders) address the following:

- a. development of personal leadership attributes;
- b. development of organizational knowledge;
- c. ethical practices;
- d. your core competencies, strategic challenges, and accomplishment of action plans?

Because of the nature of The Citadel’s workforce, distinct, but overlapping, development and learning systems have evolved for the faculty/academic administration, administrative staff, and that portion of the workforce dealing directly with the Corps of Cadets and cadet life. These systems are not intended specifically to develop leaders, but to prepare the most effective workforce for addressing the mission of the College. All members of the various components of the work force identified above are provided workshops on dealing with diversity; sexual harassment; and inappropriate behavior related to the work place or classroom. New members for the faculty are provided a faculty and cadet mentor and a detailed orientation coordinated by the Associate Provost for Academic Affairs. New members of the administrative staff are provided a detailed orientation by Human Resources. New members who will deal with cadets and cadet life are provided a detailed orientation on their roles as leadership mentors



and the Values and Respect Program. The development system for each workforce group includes presentations on the mission, core values, and strategic initiatives of the College. The President of the College updates the faculty and staff each year on the state of the institution and the progress on addressing our strategic initiatives.

6. How do you assess your workforce capability and capacity needs, including skills, competencies, and staffing levels?

Each member of the permanent faculty goes through 3 to 6 years, depending on academic rank, of extensive peer review before being considered for tenure and reviews by the department head or dean each year after tenure is awarded. In addition, members of the permanent faculty undergo post-tenure review each six years until retirement. Procedures and expectations for these reviews are presented in the Faculty Manual. The skills and competencies for staff positions are documented in the Position Description, and staff members are evaluated (EPMS) annually on their performances relative to their Position Descriptions.

7. How do you recruit, hire, and retain new employees?

Positions to be filled are widely advertised. The nature of the position will determine where the position will be posted. In the case of faculty and senior administrators, search committees are established, but in all cases, a carefully monitored process requires reviewing applications to determine if the applicant is qualified, selecting from among the qualified candidates those to be interviewed and why, documenting each interview, and selecting the most qualified applicant. This process is followed and documented in each search. For retention, The Citadel attempts to keep salaries competitive through frequent salary studies (four-year cycle), faculty and staff development opportunities, and recognition of individual accomplishments and contributions. The most recent salary study was completed in Fall 2008.

8. How does your workforce education, training, and development address your key organizational needs? How do you encourage on the job use of new knowledge and skills?

At initial hiring, the position announcements outline the education and training required. Once employed, faculty and staff are provided opportunities for professional development and to assume additional responsibilities. While most positions must be advertised and search committees formed, current employees are encouraged to apply.

9. How do you evaluate the effectiveness of your workforce and leader training and development systems?

Each workshop/presentation is evaluated, the Faculty and Staff Councils serve as sources of input, and successes of employees are monitored.

10. How do you motivate your workforce to develop and utilize their full potential?

All members of the faculty and staff are evaluated annually, and part of the evaluation is critique by the department head, dean, or supervisor. One of the responsibilities of the critique is to encourage professional growth and development. The College also provides merit increases and other recognitions of exceptional accomplishments.

11. What formal and/or informal assessment methods and measures do you use to obtain information on workforce well-being, satisfaction, and motivation?

The Citadel participates in the Chronicle of Higher Education's Great Colleges to Work for Program, which administers an annual social climate survey. A bi-annual SWOT Analysis survey is also administered which assesses faculty and staff perceptions. The Faculty Council, Staff Council, Human Affairs Committee, and ombudspersons serve as forums for assessing faculty and staff well-being, satisfaction, and motivation.

12. How do you use workforce satisfaction assessment findings to identify and determine priorities for improvement?

Findings from the surveys and organizations named in item 9 and 11 are used in the institution's strategic planning process and are shared with the departments/operations/individuals named and adjustments are made. The administrative official responsible is charged to conduct follow up investigations.

13. How do you maintain a safe, secure, and healthy work environment? (Include your workplace preparedness for emergencies and disasters.)

Both Public Safety and the Safety and Risk Manager report to the Vice President for Facilities and Engineering. Physical Plant Emergencies include: fire, electrical shorts, flooding from burst pipes or backed up drainage systems, leaking windows and roofs and those situations when additional damages will result if immediate repairs are not made. Non-emergencies include such events as : plumbing backups that do not result in overflow, plumbing that does not function when other facilities are available, lights that do not work and non functioning air conditioning.

The Safety and Risk Officer should be immediately notified anytime:

1. There has been a fire anywhere on campus that results in an injury to an employee or student, or if the fire required the use of fire fighting equipment (including portable extinguishers) or fire department response to extinguish.
2. An emergency involving any hazardous material occurs.
3. An accident or emergency that has resulted in significant (over \$1,000) in property damage has occurred.
4. An accident requiring transport by EMS or when a death has occurred.

Policies and procedures regarding public safety and emergency plans are available on The Citadel webpage.

## **Category 6 – Process Management**

1. How do you determine, and what are your organization's core competencies, and how do they relate to your mission, competitive environment, and action plans?

Throughout its history, The Citadel's primary purpose has been to educate undergraduates as members of the South Carolina Corps of Cadets and to prepare them for post-graduate positions of leadership through academic programs of recognized excellence supported by the best features of a structured

military environment. The cadet lifestyle provides a disciplined environment that supports the growth and development of character, physical fitness, and moral and ethical principles.

A complementary purpose of The Citadel, realized through the Citadel Graduate College, is to provide the citizens of the Lowcountry and the State of South Carolina opportunities for professional development by offering a broad range of educational programs of recognized excellence at both the graduate and undergraduate levels. These programs are designed to accommodate the needs of non-traditional students seeking traditional and demanding academic challenges.

The Citadel offers five undergraduate degrees with nineteen major offerings, six master's degrees in sixteen academic areas, and the specialist degree in two areas. The Corps of Cadets is a full-time residential student body functioning in a structured cadet lifestyle, and our graduate students are, in the main, practicing professionals who are employed full-time. The lifestyle of these groups requires that a great deal of learning take place in the classrooms. The Citadel, therefore, requires class attendance for all members of the Corps of Cadets and offers its degree programs through small classes taught by qualified, motivated faculty. This small student/faculty ratio is complemented with a variety of academic support services including full electronic access to Library holdings, extensive writing and learning strategy support, support for students with learning differences to help them become efficient and independent learners, and programming and activities designed to increase the involvement of minority students in extracurricular activities.

The Citadel administers a number of program-specific surveys, for example the Electrical Engineering Evaluation of Learning. The Citadel also uses multiple survey instruments to gather information from students.

Student Evaluation of Instruction--Each section of each course offered--fall, spring, Maymester, and Summer Sessions--is evaluated through the Student Evaluation of Instruction Instrument. Citadel Experience Survey--Each graduating cadet class is surveyed through the Citadel Experience Survey. This survey addresses components of the curriculum, aspects of cadet life, and each student's plans for the future. Open ended opportunities are provided to encourage students to share suggestions, criticisms, and observations.

Alumni Survey--The Alumni Survey is administered bi-annually and consists of questions prescribed by the CHE and questions designed to determine alumni satisfaction with their Citadel educational experience. This survey was administered in fall 2008 to graduates from the AY 2004-2005.

The CGC web site is user-friendly and information packed. The Student Government site provides services, a discussion forum, and current information about textbooks, classes, and services. Student surveys have consistently reported high satisfaction with the academic quality of CGC classes and instructors.

## 2. What are your organization's key work processes?

Since The Citadel is predominantly an undergraduate teaching institution, our key work processes all center around teaching and learning and supporting these activities.

## 3. How do you incorporate input from students, faculty, staff, stakeholders, suppliers, and partners for determining your key work process requirements?

Results of all surveys and questionnaires are distributed to the Senior Staff, deans/department heads, and those operations addressed.

4. How do you incorporate organizational knowledge, new technology, cost controls, and other efficiency and effectiveness factors, such as cycle time, into process design and delivery?

Every operation of the College is urged to be cognizant of ways to improve services and efficiencies in its areas of responsibility, and there are examples in every area. For faculty, bringing technology into the teaching learning processes has been a major challenge. Classrooms have been renovated with multimedia capability to include internet access for complementing lectures. Through electronic data bases and campus networking, the Library has made its holdings available to its users whenever they are needed and wherever the user might be working. For the Registrar's Office and the SIS system, degree-audits, on-line grade submission, and on-line registration are but a few of the accomplishments. The institution is currently implementing Banner, a new Enterprise Information System, which will enhance analytical reporting for decision making. These kinds of advancements can be found in practically every area of the College and result in cost saving in personnel, supplies (paper and ink), and time.

5. How do you systematically evaluate and improve your work processes?

The strategic planning process drives institutional evaluation and improvement. Additional key performance measures are user satisfaction and performance improvement. The performance measures are assessed through surveys, student participant performance, and annual assessment reports. Resource allocation for these processes is modified relative to their performance records.

6. What are your key support processes, and how do you evaluate, improve and update these processes to achieve better performance?

As an academic institution, The Citadel's primary support processes must be related to the teaching/learning enterprise, and these have already been addressed. Support processes in the areas of information management, finance and accounting, facilities management, human resources, and administration in general are evaluated through the Annual Assessment Reports, the Status Report on the Strategic Plan, the annually prepared Fact Book, the President's Dashboard, and the quarterly reports presented to the President and Senior Staff by each vice presidential level office of the College.

7. How does your organization ensure that adequate budgetary and financial resources are available to support your operations? How do you determine the resources needed to meet current budgetary and financial obligations, as well as new initiatives?

Through The Citadel's Finance module of Banner Enterprise Information System, each budgeted department has direct electronic access to its budget at all times and can move funds (except for utilities and personnel services) from one budget line to another when circumstances warrant. The Budget Office tracks revenues, expenditures, and the budget through quarterly reviews. While any department may submit at any time through appropriate channels requests for additional funds/resources to address emergency needs, The Citadel has instituted a formal Mid-Year Review process for addressing unfunded requirements that present themselves during the current budget year.

#### Implementing the Budget

June

Budget for current fiscal year is closed.

Board of Visitors approves budget for coming fiscal year.

#### July

New budget is implemented through various department accounts. Department heads validate new fiscal year budgets and notify Budget Office of any issues. Budget Office validates that budgeted revenues (student tuition/fees and State appropriations) and budgeted expenditures are in balance.

#### September-October

Budget Office conducts 1<sup>st</sup> Quarter review to ensure that revenues and spending are tracking with budget projections. Any discrepancies are reported to the departments.

#### November-December

Budget Office requests input for the Mid-Year Review. Through these requests, departments identify unfunded requirements for the current budget year and new requirements for the next fiscal year.

#### January-February

Budget Office conducts 2<sup>nd</sup> Quarter review, projects end-of-the-year revenue and expenditure levels, compares these levels with the budget, and determines if any funds can be made available to address unfunded requirements that have surfaced in the Mid-Year Review. Unfunded requirements are identified as one-time or recurring. Provost and Vice Presidents prioritize unfunded requirements and within the scope of available funds recommend to the President the funding of top priorities. The President makes final decisions on funding of unfunded requirements. Departments are notified of adjustments in budgets based on the Mid-Year Review process.

#### March-April

Budget Office conducts 3<sup>rd</sup> Quarter review; again projects end-of-the-year revenue and expenditure level, compares these with the budget, and determines if any actions are required.

#### June

Budget Office takes actions to close out the current budget year.

### Developing the Budget

#### September-October

Budget Office prepares preliminary budget for submission to State. This preliminary budget is based on historical data; projected enrollments; guidance provided by the Provost, Vice Presidents, and President; and Strategic Goals/Priorities of the College.

#### November-December-January

Through the Mid-Year Review process for the current budget, the Budget Office gathers information from the departments about unfunded requirements that are recurring or cannot be addressed in the current budget and new requirements.

#### February-March-April

Based on actual expenditures over the past two fiscal years, projected expenditures in the current year, projected revenues for the coming year, and unfunded requirements and requests for new funds identified in the mid-year review of the current budget and approved for funding in the coming budget year, the Budget Office prepares and loads into the College computer system proposed department budgets for the coming year.

May

Departments are provided electronically a computer screen containing the revised budget for the previous fiscal year, the original and revised budgets for the current fiscal year, and the proposed budget for the coming fiscal year. Based on this data, departments can identify any additional unfunded requirements. The Provost and Vice Presidents review the proposed department budgets and additional unfunded requirements identified by departments in their review of proposed department budgets and make final budget adjustments based on the results of annual assessment reports of the departments and the strategic goals/priorities of the College. The final version of the proposed budget is presented to the President.

June

Proposed budget is presented to the Board of Visitors for final approval.

July

Proposed department budgets are adjusted to reflect final budget actions. Proposed budget becomes official budget, and execution of the budget begins.

### **Category 7 – Organizational Performance Results**

The Organizational Performance Results Category examines your organization's performance and improvement in all key areas: student learning outcomes; student- and stakeholder-focused outcomes; budgetary, financial, and market performance; workforce focused outcomes; process effectiveness; and leadership and social responsibility outcomes. Performance levels are examined relative to those of competitors and other organizations providing similar programs and services. Quantitative measures may be supplemented by a discussion of qualitative measures where appropriate; however, every effort should be made to use appropriate quantitative measures that can be charted to show trends and comparisons to benchmarks.

Over the years, The Citadel has developed a variety of key indicators as it monitors organizational performance. Many of these are published in The Citadel Fact Book. Fact Book 2008 is available on The Citadel Web Page at <http://www.citadel.edu/instresearch/factbook/2008factbook.pdf>.

The Citadel has, in the main, measured its success against its own past performances. As an academic institution, The Citadel's primary support processes must be related to the teaching/learning enterprise, and these have already been addressed. Methods for evaluating and improving support processes in the areas of information management, finance and accounting, facilities management, human resources, and administration in general are being refined.

The Citadel's primary sources of performance data are the Annual Status Report on the Status of Addressing Strategic Initiatives (see Attachment II), the annual Fact Book (available on line at <http://www.citadel.edu/instresearch/factbook/2008factbook.pdf>), Annual Assessment Reports, and the President's presentation of specific performance metrics. A limited, well defined collection of key indicators/metrics have been developed by the Senior Staff of the College. The current status of each of

these key indicators is presented in a Dashboard (available on line at [http://www.citadel.edu/instresearch/dashboard/dashboard\\_june09.htm](http://www.citadel.edu/instresearch/dashboard/dashboard_june09.htm)) that is available on The Citadel webpage. Since the adoption of the Strategic Initiatives, the College has measured its performance by how well and extensively the actions taken by the various operations/departments have addressed these initiatives. The report on the revised initiatives adopted in September 2006 is included as Attachment II at the end of this document. At present, the Annual Assessment Reports, the Status Report on the Strategic Initiatives, the annually prepared Fact Book, the President's Dashboard, and quarterly reports to the President and Senior Staff by each vice presidential office are the primary tools by which the College monitors action plans and their progress.

7.1 What are your performance levels and trends for your key measures on student learning, and improvements in student learning? How do your results compare to those of your competitors and comparable organizations?

Two of the key measures for student learning are graduation rates and grade point ratios.

Table 7.1-1 Four- and Six-Year Graduation Rates

**Table 7.1-1 Four- and Six-Year Graduation Rates**

<b>Fall</b>	<b>Headcount</b>	<b>Cumulative Graduation Rates</b>	
		<b>Graduated within 4 Years</b>	<b>Graduated within 6 Years</b>
1991	538	56.10%	73.00%
1992	527	59.90%	76.80%
1993	518	59.60%	70.40%
1994	481	59.30%	66.40%
1995	499	62.50%	70.30%
1996	474	56.40%	66.20%
1997	441	62.30%	71.90%
1998	484	57.30%	66.00%
1999	517	55.00%	64.90%
2000	553	62.40%	71.30%
2001	570	59.20%	65.20%
2002	520	59.18%	68.16%

Source: Institutional Research

Table 7.1-1b Four-Year Graduation Rates

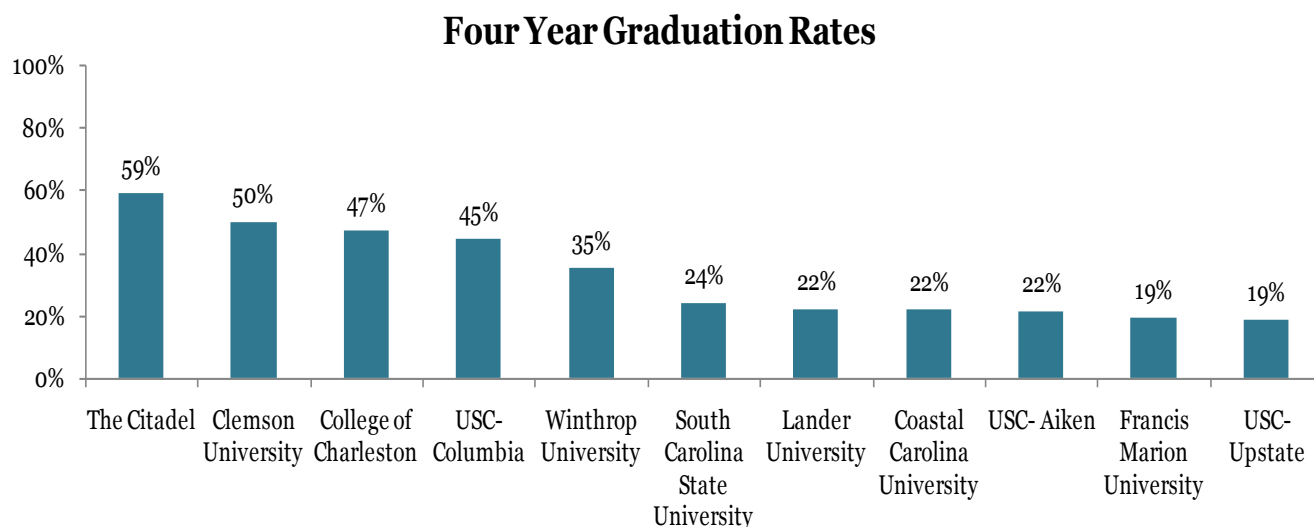


Table 7.1-2 Cumulative and Term Grade Point Ratios by Cadet Class

**Cumulative Grade Point Ratios\***

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Freshman	2.21	2.39	2.36	2.34	2.56	2.50	2.55	2.71	2.58	2.56	2.69	2.77	2.77
Sophomore	2.51	2.49	2.51	2.56	2.59	2.62	2.56	2.57	2.74	2.65	2.65	2.75	2.74
Junior	2.62	2.62	2.65	2.67	2.72	2.72	2.71	2.67	2.69	2.84	2.76	2.77	2.84
Senior	2.67	2.68	2.72	2.73	2.72	2.75	2.81	2.79	2.74	2.75	2.92	2.85	2.86

**Average Fall Term Grade Point Ratios by Cadet Classification\***

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Freshman	2.21	2.39	2.36	2.34	2.56	2.49	2.55	2.70	2.58	2.55	2.69	2.77	2.77
Sophomore	2.64	2.63	2.61	2.68	2.76	2.68	2.62	2.60	2.76	2.71	2.76	2.80	2.70
Junior	2.96	2.86	2.96	2.93	2.97	2.97	2.87	2.79	2.83	3.04	2.95	2.95	2.97
Senior	2.99	3.02	2.99	3.03	3.03	3.02	3.05	3.04	2.99	3.10	3.33	3.12	3.12

\*As of the end of the Fall Semester; excluded discharged cadets.

Source: Associate Provost Semester Grade Analysis

7.2 What are your performance levels and trends for your key measures on student and stakeholder satisfaction and dissatisfaction? How do your results compare with competitors and comparable organizations?

Major key measures of student satisfaction are fall to fall retention rates for all classes. As an example, the following table provides freshman retention.



Table 7.2-1 Fall to Fall Retention Rates for First-Time/Full-Time Freshman Cadets

**Table 7.2-1 Fall to Fall Retention Rates for  
First-Time/Full-Time Freshman Cadets**

<b>Fall</b>	<b>Headcount</b>	<b>Retention Rate after 1 Year</b>
2000	553	81.00%
2001	570	78.40%
2002	520	77.50%
2003	553	80.50%
2004	569	81.90%
2005	585	81.90%
2006	584	81.20%
2007	621	83.70%

Source: Institutional Research

The Citadel continues efforts to enhance Academic Support Services. The following table presents expenditures in support of the Office of Access Service, Instruction, and Support (O.A.S.I.S.), that provide service for students with learning difference, Writing and Learning Strategies, and Multicultural Student Services.

Table 7.2-2 Expenditures in Academic Support Services

	2004	2005	2006	2007	2008
OASIS	\$291,057	\$303,778	\$327,741	\$325,816	\$111,619
Writing and Learning Strategies	\$108,342	\$154,365	\$187,776	\$192,665	\$507,063
Multicultural Student Services	\$ 103,211	\$105,239	\$10 2,589	\$139,850	\$150,058
Citadel 101	\$ 25,000	\$ 25,000	\$ 25,000	\$ 28,157	\$ 28,600
TOTAL	\$523,533	\$588,382	\$642,188	\$686,488	\$797,340

Student satisfaction is also assessed through the Citadel Experience Survey that is administered to each graduating cadet each spring. The results are provided to each organization or service addressed in the survey. Alumni are surveyed every other year, and results are shared.

7.3 What are your performance levels for your key measures on budgetary and financial performance, including measures of cost containment, as appropriate?

The Citadel's financial statement audits going back to 1997, and NCAA audits going back to 1998 are available at <http://osa.sc.gov/statereports/citadel/>. Expenditures are closely monitored against budgets, and budgets are closely monitored against revenues.

Table 7.3-1 Quarterly Budget versus Actual Expenditures (2006 VS 2008)

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter
2005-06	24.0%	45.9%	71.0%	95.9%
2006-07	22.3%	45.0%	70.3%	95.0%
2007-08	21.7%	45.3%	68.4%	93.4%
Five-Year Ave. (03-08)	23.3%	46.1%	71.1%	96.0%

Table 7.3-1a Quarterly Budget versus Actual Revenues (2006 VS 2008)

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter
2005-06	40.7%	81.7%	91.0%	101.8%
2006-07	41.4%	79.9%	91.6%	102.6%
2007-08	51.0%	98.3%	101.2%	107.4%
Five-Year Ave. (03-08)	40.0%	78.6%	90.1%	103.0%

7.4 What are your performance levels and trends for your key measures of workforce engagement, workforce satisfaction, the development of your workforce, including leaders, workforce retention, work force climate including workplace health, safety, and security?

The Citadel depends on the Faculty Council, Staff Council, and Human Dignity Committee to identify issues of concern to the faculty and/or staff. When such issues are presented, steps are taken to address them. For example, when issues of inequities in salaries and promotions were raised several years ago, the College engaged a consultant to review all faculty and staff salaries and compare them with national averages. Substantial salary increases were provided, and the College is committed to conducting a salary review on a four-year cycle. In addition, the College sponsors an Employee Appreciation Day each summer. All employees are invited to The Citadel Beach House for fun, food, and prizes.

Key performance measures for faculty performance and development are funding levels provided for faculty research and development.

Table 7.4-1 Faculty Development and Faculty Research

	2004	2005	2006	2007	2008
Faculty Development	\$170,000	\$170,000	\$155,000	\$ 95,000	\$ 98,503
Faculty Research	\$195,000	\$195,000	\$219,000	\$233,374	\$227,500
Sabbatical Support	\$100,000	\$100,000	\$ 95,000	\$170,875	\$ 30,000
TOTAL	\$465,000	\$465,000	\$469,000	\$499,249	\$454,506

An additional key performance measure for faculty satisfaction is average salaries.

Table 7.4-2 Average Faculty Salaries by Academic Rank

	<b>Professor</b>					
	<b>2003-04</b>	<b>2004-05</b>	<b>2005-06</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>
The Citadel	\$67,072	\$74,514	\$77,745	\$77,994	\$77,456	\$79,907
Coastal Carolina	\$62,281	\$68,471	\$71,845	\$73,231	\$78,667	\$82,159
College of Charleston	\$68,135	\$71,298	\$75,055	\$76,064	\$77,260	\$80,548
Winthrop Univ.	\$62,403	\$65,448	\$69,727	\$72,651	\$75,230	\$75,968

	<b>Associate Professor</b>					
	<b>2003-04</b>	<b>2004-05</b>	<b>2005-06</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>
The Citadel	\$55,885	\$60,986	\$64,425	\$65,858	\$68,850	\$67,693
Coastal Carolina	\$53,937	\$56,615	\$59,385	\$62,123	\$63,887	\$67,679
College of Charleston	\$53,901	\$57,400	\$60,165	\$61,522	\$63,396	\$65,407
Winthrop Univ.	\$54,456	\$57,919	\$60,168	\$63,131	\$65,428	\$65,780

	<b>Assistant Professor</b>					
	<b>2003-04</b>	<b>2004-05</b>	<b>2005-06</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>
The Citadel	\$47,148	\$48,957	\$52,627	\$53,043	\$55,655	\$54,035
Coastal Carolina	\$44,887	\$48,248	\$51,395	\$53,996	\$57,786	\$58,005
College of Charleston	\$45,268	\$47,196	\$49,596	\$52,461	\$55,527	\$59,008
Winthrop Univ.	\$45,908	\$47,433	\$50,621	\$52,117	\$53,005	\$53,895

Note: Faculty Salaries reported according to CUPA definitions

7.5 What are your performance levels and trends for your key measures of organizational effectiveness/operational efficiency and work system performance (these could include measures related to the following: student performance and development; the education climate; responsiveness to student and stakeholder needs; supplier and partner performance; and cycle time)?

Tables addressing Student Performance/Development are presented in 7.1 and 7.2 above. Key measures of organizational effectiveness/operational efficiency are being developed as described in the introduction to this category.

A key measure in monitoring Strategic Initiative C, Enhance the Learning Environment, is the scholarships and grants provided by the College.

Table 7.5-1 Scholarship and Grants

	2004	2005	2006	2007	2008
Citadel Funded Scholarships	\$4,204,074	\$4,366,278	\$4,020,553	\$4,266,549	\$4,836,775
Athletics Grants in Aid	\$1,898,302	\$2,081,551	\$2,140,729	\$2,146,968	\$2,613,699
Fee Abatements	\$ 929,398	\$ 996,406	\$1,115,789	\$1,119,533	\$1,414,638
ROTC Scholarships	\$ 479,673	\$ 421,470	\$ 412,100	\$ 431,938	\$ 630,953
TOTAL	\$7,511,447	\$7,865,705	\$7,699,171	\$7,964,988	\$9,496,065

Table 7.5-1a Graduate Assistantships

	2004	2005	2006	2007	2008
Citadel E & G Funded	\$ 63,300	\$ 72,431	\$ 87,225	\$ 70,863	\$ 33,948
The Citadel Foundation Funded	\$374,631	\$384,420	\$367,713	\$348,105	\$405,000
TOTAL	\$437,931	\$456,851	\$454,938	\$418,968	\$438,948

The Citadel continues its efforts to improve an aging physical plant. The Citadel has now replaced three barracks with new facilities and constructed one new barracks. Stevens Barracks is the sole remaining existing barrack and was constructed in the late 1940s. Stevens Barracks is undergoing extensive renovations on three floors in support of the increasing size of the Corps of Cadets. It is projected that these renovations will render Stevens Barracks serviceable until funds can be secured to replace it.

Table 7.5-2 Expenditures for Deferred Maintenance and Replacing Older Facilities

2004	\$11,714,347
2005	\$ 8,391,512
2006	\$23,099,554

2007 \$13,036,613  
 2008 \$16,764,702

7.6 What are your performance levels for your key measures related to leadership and social responsibility?

a.) accomplishment of your organizational strategy and action plans

Since The Citadel considers service as a cornerstone of principled leadership, public service is reviewed each year. Three service awards (Ackerman Leadership in Community Award, Harry R. Dawley, Jr. Community Service Award, and Andrew Mazur Citizenship Medal) have been established to recognize exemplary records in community service. The Corps of Cadets continues to compile a significant record of community service and to support the community with significant donations through on-campus blood donations to the American Red Cross.

The Krause Initiative in Ethics and Leadership, in support of The Citadel Vision, is a college-wide effort to enhance leadership development and ethical growth at The Citadel.

Established in July of 2003, the mission of the Krause Initiative is to provide institutional programs and activities that will help strengthen The Citadel's preparation of principled leaders. Supporting The Citadel's core values, the Krause Initiative promotes the ethical growth and leadership development of our students while serving as a model for peer institutions.

Table 7.6-1 The Krause Initiative on Ethics and Leadership

	2004	2005	2006	2007	2008
Citadel Subsidy	\$ *	\$ *	\$ 8,135	\$ 21,370	\$69,979
Krause Funds	\$62,220	\$68,346	\$85,029	\$ 83,969	\$122,569
TOTAL	\$62,220	\$68,346	\$93,164	\$105,339	\$210,844

The Citadel continues to market its CGC programs aggressively.

Table 7.6-2 Marketing Expenditures for College of Graduate and Professional Studies

	2004	2005	2006	2007	2008
Advertising	\$ 52,636	\$ 66,306	\$ 63,185	\$ 63,709	\$ 64,334
Salaries	\$ 48,000	\$ 68,111	\$ 68,111	\$ 55,454	\$ 61,410
TOTAL	\$100,636	\$134,417	\$131,296	\$119,163	\$125,744

The Citadel continues efforts to enhance the technological environment of the College in support of teaching and learning. In Summer 2008, we initiated the implementation of a new ERP. This is a multi-year, multi-million dollar project that will have profound impacts on every aspect of the College.

Table 7.6-3 Expenditures for Information Technology in Support of Teaching and Learning

	2004	2005	2006	2007	2008
Data Processing Supplies	\$135,638	\$359,283	\$690,450	\$418,183	\$ 265,981
IT Equipment under \$5000	\$50,026	\$ 42,986	\$ 19,034	\$ 83,647	\$ 79,298
Software	\$340	\$ 4,421	\$ 32,537	\$ 60,248	\$ 823,012

Equipment	\$250,026	\$154,082	\$102,132	\$108,170	\$ 41,787
TOTAL	\$436,919	\$560,772	\$839,392	\$670,248	\$1,210,078

b.) stakeholder trust in your senior leaders and the governance of your organization

During the 2008-2009 academic year, The Citadel participated in the Chronicle of Higher Education's Great Colleges to Work For Program, which administers a social climate survey to faculty and staff. We expect the results of this data in Fall 2009.

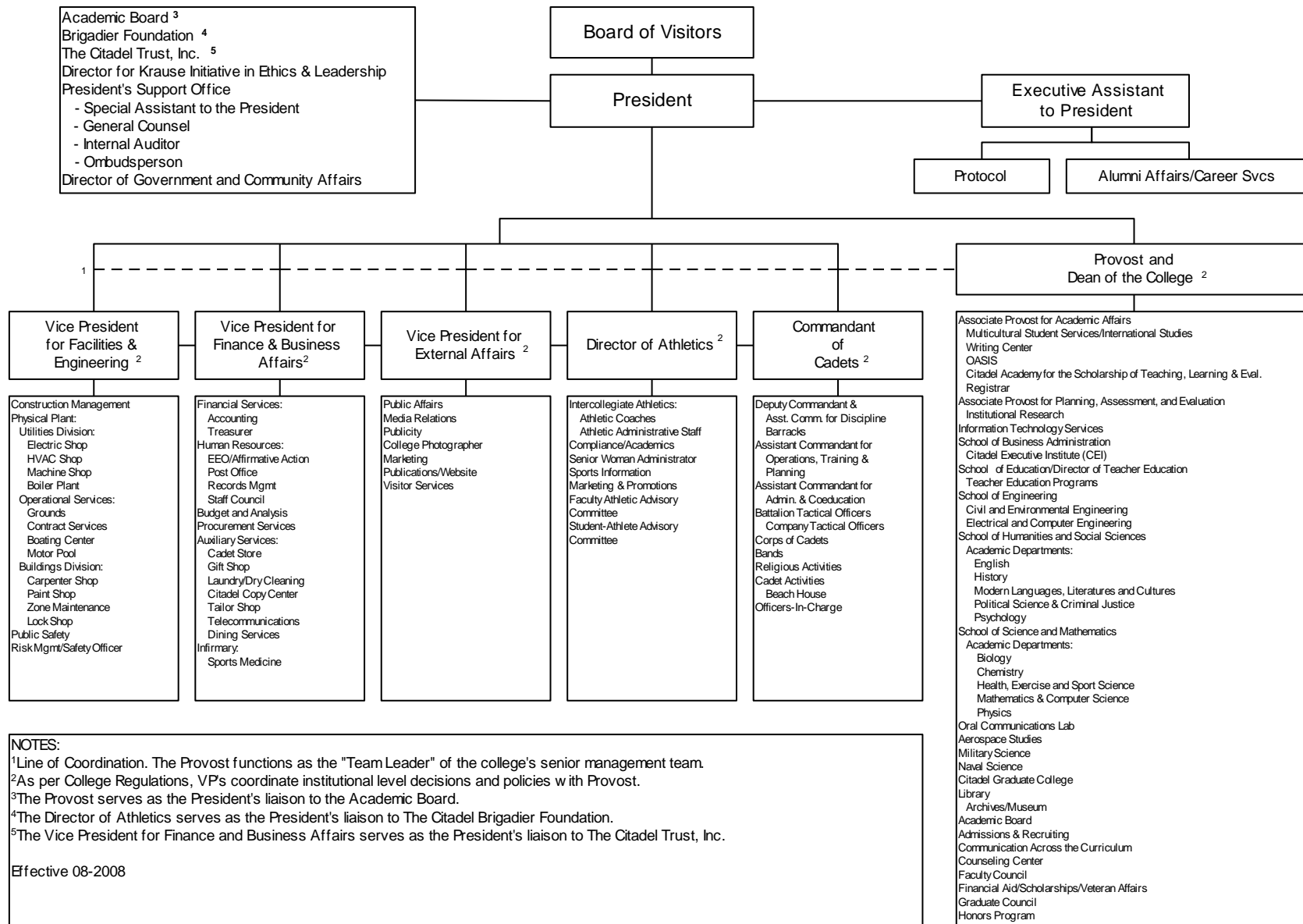
c.) fiscal accountability; and, regulatory, safety, accreditation, and legal compliance

The Citadel has selected as a key measure of fiscal accountability the monitoring of expenditures against budget. See Table 7.3-1 above. The Citadel's procurement services are audited every three years by the Materials Management Office of Audit and Certification. The Citadel's compliance record is also part of each external financial audit. Because The Citadel's operating budget has remained fairly stagnant over the past several years and there has been little flexible funding, we have measured our success in terms of actions taken to address the mission of the College and specifically the Strategic Initiatives approved by the BOV.

d. organizational citizenship in support of your key communities?

See Category 1, item 10. As an academic institution, The Citadel supports its communities through a variety of events each year that are open to the public. These include the annual Christmas Candle Light Service presented by Cadet Choral Groups, the Fine Arts Series, the Friends of the Library Series, and speakers and presentations sponsored by schools and academic departments.

# The Citadel Organization and Function Chart August 4, 2008



## **Attachment I**

### **Objectives/Action Items for Revised Strategic Initiatives 2002-2009**

#### **A. *Focus on the Development of Principled Leaders***

1. Implement the initial phase of the Citadel Values and Respect Program by Fall 2006 (SA/AD).
2. Integrate Vision, Mission, and Core Values into all Corps related training and activities starting in Fall 2006 and CGC related information and activities starting in Fall 2007.
3. Create an integrated leader development model within the Citadel Experience by August 2007.
4. Fully develop and implement the Citadel Values and Respect Program (Honor Education, Wellness, Human dignity, Leader Development, Sexual Assault/ Harassment) by Fall 2007.
5. Complete the study of the 24 hour schedule and physical effectiveness of the 4<sup>th</sup> class IAW the QEP May 2007. Implement needed changes in Fall of '07.
6. Establish an automated Cadet Accountability System by fall 2007 IAW QEP.
7. Review the Honor System by May 2008 as an integral component in the preparation of Principled Leaders.
8. Review Cadet Discipline System by May 2008 as an integral component in the preparation of Principled Leaders.
9. Embed a culture of Values and Respect into The Citadel ethos by Fall 2010.

#### **B. *Strengthen the College through Institutional Advancement***

1. Develop a Strategic Communications Plan for the college by July 2006 and update as needed (semi-annually).
2. Enhance donor relations and stewardship processes with TCF, TCBF, and CAA by Spring 2007.
3. Create a comprehensive Marketing Plan by fall 2007.
4. Develop concepts and plan for future capital campaign by 1 Oct 2007.
5. Provide TCF, TCBF, and CAA "need based" statements annually to portray funding shortfalls for different institutional needs appropriate for fundraising.
6. Acquire sufficient unrestricted and restricted private funding by 2010 to allow The Citadel to operate with a stable funding base and to limit annual student tuition and fee increases to the Higher Education Price Index (HEPI).

#### **C. *Enhance the Learning Environment***

1. Complete NCAA Self Study by May 2007.
2. Provide resources on an annual basis to enable all students to be competitive at conference or national levels across all program areas by fall 2007.
3. Achieve initial accreditation in Computer Science by AY 2007-2008.
4. Improve and continue to integrate the academic support programs, as reflected by our assessment process, to meet the goals of the institution by fall 2008.
5. Maintain accreditation through the Southern Association of Colleges and Schools (SACS) by fully implementing the QEP by August 2009.
6. Maintain Academic Program accreditation in the following academic areas; Business Administration, Education, Engineering, and Psychology. Critical dates will vary by professional association. Fall 2007 is the earliest critical date (Education).
7. Review annual academic assessment reports to determine critical needs for inclusion in the budget request process by fall 2006.

#### **D. *Develop the Student Population***

1. Determine annually the feasibility of additional off-campus course offerings to include distance learning capabilities by fall 2006.

2. Revise recruiting strategy and goals by Jan 2007 to achieve increased minority and female representation within the Corps.
3. Average one national level post-graduate scholarship per year by May 2007.
4. Review feasibility of reinstating Veterans Program by June 2007
5. Examine institutional best practices of assessing the quality of incoming class and establish a revised methodology by fall 2007.
6. Conduct academic needs assessment every 3-5 years beginning fall 2008.
7. Improve freshman and class cohort retention to exceed the national average and those of designated peer institutions IAW QEP by 2009.
8. Implement Plan A (grow Corps by approximately 2 companies) by fall 2010.
9. Using AY 05-06 as a baseline, grow CGC enrollment by 25 % by fall of 2010.

*E. Enhance the Facilities and Technological Support for the Campus*

1. Create and implement an integrated technology plan for The Citadel beginning by Aug 2007.
2. Annually plan and execute expenditure of State Education Lottery funding to improve institution's technology capabilities by fall 2007.
3. Revise The Citadel Facilities Master Plan IAW Comprehensive Permanent Improvement Plan (CPIP) schedule for 2007 and beyond.
4. Reduce deferred maintenance at an average annual rate of 25% of total deferred maintenance costs by 2012 (pending consistent funding levels).

*F. Improve Institutional Effectiveness*

1. Develop and implement a reporting process that provides standardized "key metrics dashboards" to reflect institutional progress by 31 August 2006.
2. Integrate the following State reporting requirements, by September 2006, into the planning/assessment processes of the College (annual): CHE Performance Funding; Agency head Evaluation; Accountability Report.
3. Improve organizational design and capacity for institutional assessment to embed integrated assessment efforts within The Citadel culture by July 2007.
4. Seek out best practices and, as a minimum, implement a new practice in each VP area that improves organizational effectiveness and reduces the need for annual tuition increases by spring 2008.
5. Revise and publish a strategic planning process that outlines a formal process of assessing results, updating performance indicators, and revising plans that contribute to institutional progress by fall 2008.

*G. Ensure the College has the Leadership and Talent to Accomplish these Goals*

1. Conduct a faculty salary study every three years beginning in fall 2006.
2. Revise the recruiting and hiring processes to improve the diversity of the administration, faculty and staff (by Jan 2007).
3. Establish diversity goals for each employment category annually.
4. Quarterly examine staffing levels to ensure sufficient manning and to determine progress toward diversity goals.
5. Conduct a salary study for administrative and staff positions every three years beginning in spring 2007



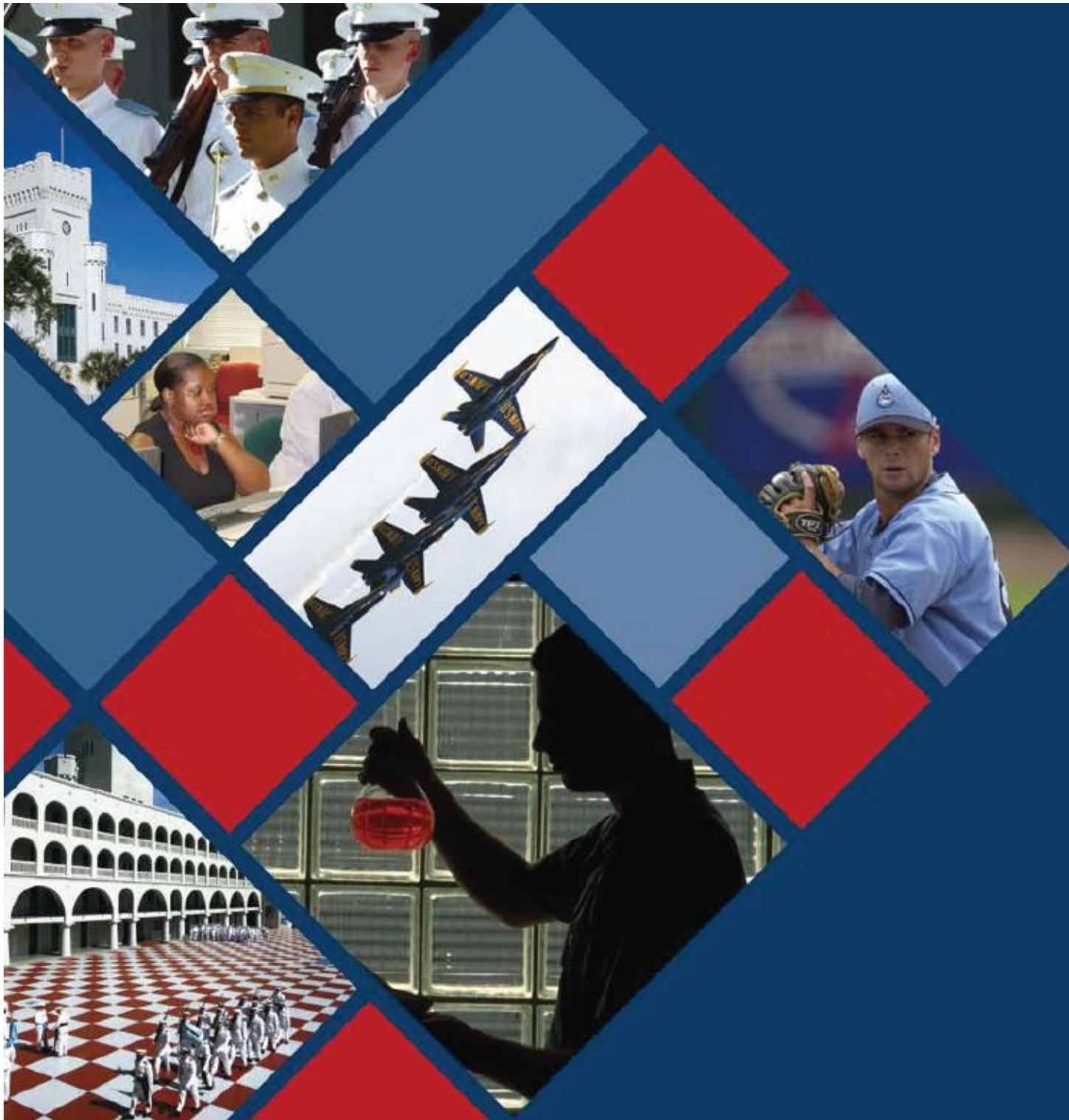
**Attachment II****Objectives and Actions for The Citadel Strategic Initiatives 2008-09**

<b>Third Year Objectives June 2008 – May 2009</b>		<b>Status</b>
<b>A2</b>	Integrate Vision, Mission, and Core Values into all Corps-related training and activities starting in Fall 2006 and CGPS related information and activities starting in Fall 2007.	<b>On Track</b>
<b>A3</b>	Create / refine an integrated leader development model within the Citadel Experience by Spring of 08.	<b>On Track</b>
<b>A5</b>	Complete the study of the 24-hour schedule and physical effectiveness of the 4 <sup>th</sup> class IAW the QEP by May 2008. Implement needed changes Fall of '08.	<b>On Track</b>
<b>A7</b>	Review the Honor System by May 2009 as an integral component in the preparation of Principled Leaders	<b>Started, Not On Track</b>
<b>A8</b>	Review Cadet Discipline System by May 2009 as an integral component in the preparation of Principled Leaders.	<b>Started, Not On Track</b>
<b>B1</b>	Develop a Strategic Communications Plan for the college by Fall 2008 and update as needed (semi-annually).	<b>On Track</b>

<b>Third Year Objectives June 2008 – May 2009</b>		<b>Status</b>
<b>B2</b>	Continue to enhance donor relations and stewardship processes with TCF, TCBF, and CAA.	<b>On Track</b>
<b>B3</b>	Create a comprehensive Marketing Plan by Fall 2008.	<b>On Track</b>
<b>B4</b>	Develop concepts and plan for future capital campaign by Spring of 08.	<b>On Track</b>
<b>D1</b>	Determine annually the feasibility of additional off-campus course offerings to include distance learning capabilities by Fall 2006.	<b>On Track</b>
<b>D2</b>	Review / revise recruiting strategy and goals and annually thereafter to achieve increased minority and female representation within the Corps.*	<b>On Track</b>
<b>D3</b>	Continue to produce at least one national level post-graduate scholarship per year.	<b>On Track</b>
<b>D6</b>	Conduct academic needs assessment every 3-5 years beginning Fall 2008.	<b>Started, Not On Track</b>

Attachment III: New Strategic Plan Built During 2008-2009

The Citadel Blueprint: The Strategic Plan for Educating Principled Leaders 2009-2012



THE CITADEL  
**Blueprint**  
THE STRATEGIC PLAN FOR EDUCATING PRINCIPLED LEADERS

## **Vision Statement**

Achieving excellence in the education of principled leaders.

## **Mission**

The Citadel's mission is to educate and prepare graduates to become principled leaders in all walks of life by instilling the core values of The Citadel in a challenging intellectual environment.

## **Core Values**

### ***Academics***

We produce graduates who have insight into the issues, ideas and values that are important to society and possess the skills necessary to deal with them successfully.

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### ***Duty***

We emphasize the importance of individual accountability and the moral obligation of responsibility for the welfare of others.

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### ***Honor***

We adhere to a code which teaches that uncompromising personal integrity is the primary guide in all situations.

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### ***Morality***

We believe that an individual's character is of utmost importance and, therefore, we provide training which emphasizes ethical principles and core values.

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### ***Discipline***

We operate a leadership laboratory which emphasizes a structured environment, acceptance of responsibility, self-confidence and service to others.

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### ***Diversity***

We promote diversity in all segments of our campus community and in all aspects of college life.

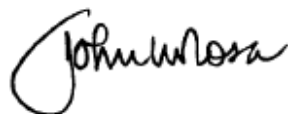
## LETTER FROM THE PRESIDENT AND DEAN OF COLLEGE

Last fall, we embarked on an important journey to plan, shape, and position The Citadel for future successes. Over the past year, The Citadel conducted a campus-wide planning process that engaged the campus community in a discussion of the institution's strategic goals and future vision, culminating in The Citadel's 2009-2012 Strategic Plan. This planning document communicates The Citadel's priorities and lays the foundation for a successful capital campaign that will take the institution to new heights of academic and leadership excellence.

Building upon previous strategic planning processes, our mission, and core values, the following eight strategic initiatives will continue to form the foundation of the institution's planning efforts and help define the college's planning priorities:

- (1) Develop principled leaders in a globalized environment.
- (2) Enhance the learning environment.
- (3) Strengthen the College through institutional advancement.
- (4) Develop the student population.
- (5) Enhance the facilities and technological support for the campus.
- (6) Improve institutional effectiveness.
- (7) Ensure the College has the leadership and talent to accomplish these strategic initiatives.
- (8) Provide outreach to the region and serve as a resource in its economic development.

We believe this set of strategic initiatives – which reflects years of thoughtful conversations and planning – synthesizes our most important aspirations and provides a solid foundation on which to set goals, establish benchmarks, and express a collective vision for our future. Over the next three years, we will implement objectives and actions to achieve our strategic initiatives, bringing added value that advances and distinguishes The Citadel as the foremost institution in the south for producing principled leaders.



John W. Rosa, '73  
*Lieutenant General, USAF (Retired)*  
President



Brigadier General Samuel M. Hines, Jr.  
Provost and Dean of the College





## About The Citadel

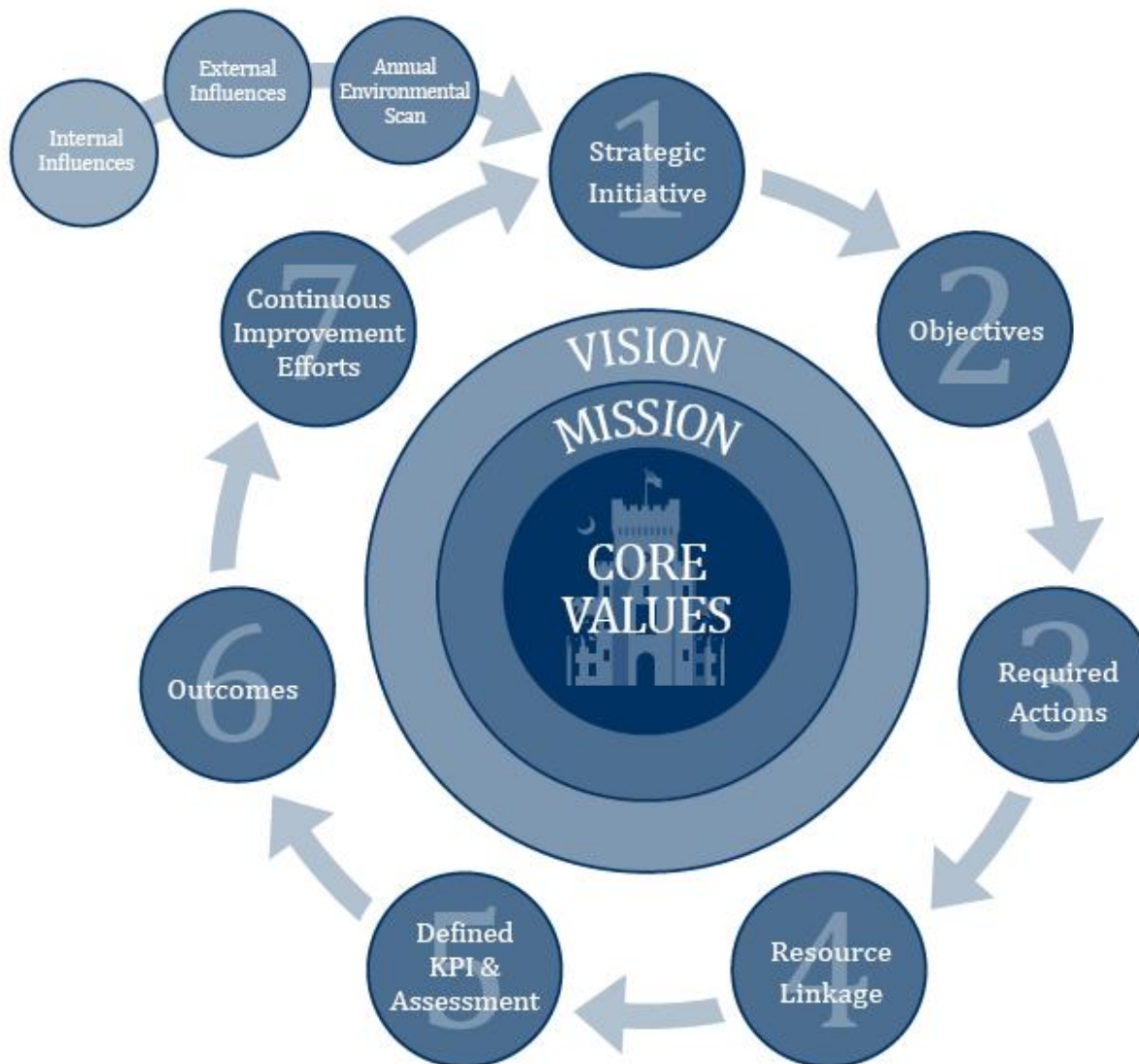
The Citadel is a landmark in Charleston and South Carolina that is noted for its educational reputation as well as its rich history. Founded in 1842, The Citadel has an undergraduate student body of about 2,000 students who make up the South Carolina Corps of Cadets. Another 1,000 students attend The Citadel Graduate College, a civilian evening program that offers graduate and professional as well as undergraduate programs.

The Citadel is best known nationally for its Corps of Cadets, which draws students from about 40 states and a dozen countries. The men and women in the Corps live and study under a classical military system that makes leadership and character development an essential part of the educational experience.

The Citadel is divided into five academic schools: Business, Education, Engineering, Humanities and Social Sciences, and Science and Mathematics. Because of its focus on strong academic achievement, a high graduation rate and strong alumni support, The Citadel ranks highly in the annual U.S. News & World Report ratings of southern colleges that offer at least a master's degree.



## Strategic Planning Process



In September 2008, strategic planning folders were distributed to every member of The Citadel's faculty and staff. In December 2008, we received strategic planning proposals from campus-wide constituencies, including proposals for two new strategic initiatives, 105 new objectives and 314 new actions. After carefully setting priorities, the Strategic Planning Working Group narrowed these proposals down to 8 strategic initiatives and 30 new objectives that best represent the stature and prominence we desire for The Citadel of the future.







# 1

## Strategic Initiative One

*Develop Principled Leaders in a Globalized Environment*

The Citadel develops principled leaders who are well-equipped to embrace the opportunities and challenges presented by an increasingly globalized environment. Achieving our mission requires an integrated effort, involving all members of The Citadel community. During the next 3 years, The Citadel will take the following actions to strengthen this integration.

### Objective 1.1

#### *Integrate the Leader Development Model into Academic Programs*

The Citadel's Leader Development Model includes an academic pillar; a process whereby integration and infusion of leadership learning outcomes provides a cohesive experience for students. In this model, leadership training and academic coursework are mutually reinforcing. The Citadel will further refine this integration by:

- Enhancing the Leadership Minor curriculum
- Advertising the Leadership Minor campus-wide and to prospective students
- Embedding leadership learning outcomes in academic components of The Citadel Experience

#### **Key Performance Indicators:**

- Leadership minor's student enrollment will rank in the top 3 of all minors

### Objective 1.2

#### *Fully Develop the Krause Leadership Center and Expand its Reach*

The Krause Leadership Center is a powerful nexus of the college's Leader Development Model and integration of academic, military, moral and ethical, and physical pillars, all of which comprise The Citadel Experience. Further evolution of the Krause Leadership Center will focus on expanding capacity to enhance the development of principled leaders.

- Refine the mission and establish permanent staffing and budget lines within the Krause Leadership Center

#### **Key Performance Indicators:**

- Increase the capacity and prominence of the Krause Leadership Center
- Increase the programming and activities to promote growth across all four pillars

### Objective 1.3

#### *Implement a Comprehensive Leadership Assessment Model*

The Citadel's mission statement sets the context for institutional assessment. The Citadel will focus on defining and assessing the four pillars of the Leader Development Model, providing further evidence of student achievement and principled leadership. In particular, we plan to:

- Expand the Leader Development Model to include expected learning outcomes in each pillar and refine programming and activities to accomplish the desired outcomes
- Implement Leadership e-portfolios and 360-degree assessment instruments with benchmarks

##### **Key Performance Indicators:**

- Define The Citadel Experience through learning outcomes in each pillar
- Collect and analyze data on each learning outcome

### Objective 1.4

#### *Promote a Spirit of Selfless Service Throughout the Corps of Cadets*

Duty and Honor are embedded as guiding principles at The Citadel. Citadel graduates engage in a wide array of selfless service activities including military and government service, teaching and volunteer services. The Citadel will continue to implement programming and activities that foster a spirit of selfless service. Specifically, we will take actions over the next three years to:

- Increase commissioning into the military services
- Expand service-learning opportunities for students at every level of undergraduate and graduate education

##### **Key Performance Indicators:**

- Increase commissioning rate by 5%.

### Objective 1.5

#### *Integrate Career Planning into the Campus Culture*

Career Development is a core element of the Leader Development Model. Expanding career development services and requiring all Cadets to complete a Career Planning Portfolio will enrich the career development process and aid their job search efforts. To achieve stronger results, we expect to:

- Increase staffing to broaden career services and on campus recruiting for Cadets and graduate students
- Implement a required Career Planning Portfolio for Cadets

##### **Key Performance Indicators:**

- 100% of students completing Career Planning Portfolios
- Increase Job Placement rates prior to graduation to 60%
- Partner with The Citadel Alumni Association to develop an effective tracking system for recent graduates to measure placement success within six months of graduation



## 2

## Strategic Initiative Two

### *Enhance the Learning Environment*

The formula for education success at The Citadel is clear and vital – investing in strategic campus innovations will enhance the learning environment and elevate the institution's global competitiveness.

The common goals of these pathways promote academic programs of excellence and distinction within each academic school, support efforts to enhance student success, develop a more competitive presence in adult and graduate education, maintain academic program accreditation, and extend the college's engagement in international and global education activities.

### ► Objective 2.1

#### *Enhance Student Retention*

As The Citadel continues to lead South Carolina public colleges and universities with the highest 4-year graduation rate, we strive for even greater levels of student success. The college will employ several new actions during the next 3 years to raise retention rates for freshmen as well as 4-year and 6-year graduation rates:

- Create an early warning system to provide supplemental instruction to students enrolled in selected courses where students may encounter academic difficulty.
- Expand participation in the College Success Institute
- Enhance the Mandatory Study Program by providing staff development to company academic officers and Center tutors

#### **Key Performance Indicators:**

- Increase enrollment in the freshman preparatory program, College Success Institute, by 25%
- Increase 4-year graduation rate to over 60% and the 6-year graduation rate to over 70%
- Increase the freshman academic retention rate by 10%

### ► Objective 2.2

#### *Create Academic Programs of Excellence and Distinction Within Each School*

During the next 3 years, The Citadel will increase its emphasis on developing new courses of study and expanding existing academic programs that foster excellence in the learning environment and elevate institutional prominence. New distinctive programs we have identified include:

- The STEM Center of Excellence as a new collaborative entity among the Schools of Education, Engineering, and Science and Mathematics
- Multiple Centers of Excellence to be developed within the School of Business
- The Citadel's expanded Oral History Program and Leadership Archive





- The International Education and Study Abroad Office, Citadel International Scholars, and Faculty Fellows Program will be formed to promote globalization across the College

#### **Key Performance Indicators:**

- Increase enrollment in STEM disciplines by 10%
- Increase National Survey of Student Engagement (NSSE) scores for enriching educational experiences by 5%
- Increase number of students studying abroad by 15%

### **Objective 2.3**

#### ***Enhance the Position of the College as a Regional Leader in Adult and Graduate Education***

As a powerful regional growth asset, The Citadel Graduate College has a rare opportunity to provide outreach and educational services to local and national audiences, while delivering tangible economic development benefits to the region. The Citadel is pursuing several actions to capitalize on these opportunities:

- Creation of an Adult and Professional Education Office
- Enhancing Citadel Graduate College student services
- Increased focus on the design and growth of graduate programs and exploration of innovative alternative delivery methods

#### **Key Performance Indicators:**

- Increase CGC student enrollment by 25%
- Increase graduate student satisfaction with student services by 10%



# 3

## Strategic Initiative Three

### *Strengthen the College Through Institutional Advancement*

The tumultuous economic environment is forcing most institutions to negotiate extraordinary financial challenges and operate with limited resources. The College must redouble its efforts to identify alternative funding sources and advancement opportunities. During the next three years, The Citadel will implement actions to expand endowment funding, boost grant funding, increase the financial independence of The Citadel Athletics Program, and forge greater partnerships with The Citadel Foundation.

#### ► Objective 3.1

##### *Expand Endowment Funding to Support Programs of Excellence*

Continuous investment in the College's strategic priorities is critically important to fuel the institution's trajectory of excellence, despite economic difficulty. During the next three years, the institution will implement several actions designed to create new funding sources, including:

- Establish a Citadel Office of Research, Grants, and New Programs Development
- Expand grant writing expertise throughout the campus community by participating in professional development seminars and conferences on grant writing
- Develop events specifically geared toward CGC students and alumni

##### **Key Performance Indicators:**

- Increase grant-writing activity to generate a 20% increase in grant revenue by 2012
- Increase number of faculty submitting grants by 15%

#### ► Objective 3.2

##### *Increase the Financial Independence of The Citadel Athletics Program*

Athletic programs are an integral component of educating principled leaders, fostering institutional loyalty and spirit, and maintaining a vibrant campus community. The institution will institute the following actions designed to strengthen the athletics program specifically, and the College generally, during the next three years:

- Create an Athletics Excellence Fund
- Increase membership in the Brigadier Foundation (athletic foundation)

##### **Key Performance Indicators:**

- Increase membership in the Brigadier Foundation to reach 2,180 by 2012
- Increase gifts to the Athletics Program to reach \$250,000 by 2012



### Objective 3.3

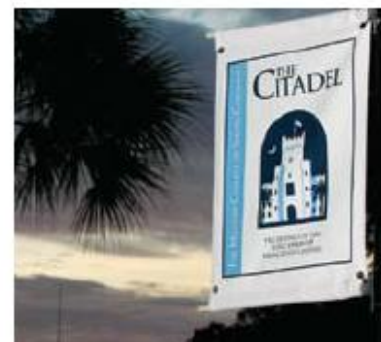
#### *Actively Engage The Citadel Foundation in a Greater Partnership to Increase Philanthropic Support*

Philanthropic support generated through The Citadel Foundation enables the College to achieve its mission of educating principled leaders. Fostering collaboration and partnership will strengthen:

- Expanding the number of faculty and staff working in partnership with The Citadel Foundation to raise funds for strategic initiatives
- Increasing the number of alumni and non-alumni donors
- Sustaining and advancing collaboration opportunities with academic deans and advisory boards

#### **Key Performance Indicators:**

- Advance The Citadel's Endowment Amount-per-Student ranking into the top 10 public comprehensive institutions in the country
- Achieve a 50% alumni giving rate





## 4 Strategic Initiative Four

### *Develop the Student Population*

The institution strives to enroll a diverse community of leaders whose members share a common Citadel Experience. Expanding the veteran population, increasing student diversity, deploying a comprehensive marketing strategy, and growing enrollment in The Citadel Graduate College are core strategies in developing this community of leaders.

#### ► Objective 4.1

##### *Expand Enrollment in The Citadel Graduate College*

The Citadel Graduate College is poised for carefully planned student enrollment growth and expansion of academic programs. The institution will employ a variety of actions to increase enrollment, including:

- Establish The Citadel Graduate Assistantship Initiative to attract top graduate students to The Citadel
- Increase resources for graduate programs, including marketing, development, and student services to reflect the increased priority of graduate programs
- Expand Graduate Education offerings to meet the demand in the Lowcountry

##### **Key Performance Indicators include:**

- Increase student enrollment in The Citadel Graduate College by 25%
- Expand graduate educational offerings

#### ► Objective 4.2

##### *Develop a Comprehensive Marketing Strategy to Position The Citadel Competitively*

The Citadel will increase its emphasis on developing an aggressive marketing strategy.

- Conduct market research that drives strategic positioning; develop a compelling institutional brand identity and conduct all outreach with consistent graphics in advertising and communications with all constituents

##### **Key Performance Indicators:**

- Marketing performance metrics showing increases in inquiries, applications, enrollment and funding
- Qualitative survey results and student testimonials that demonstrate a stronger appreciation for The Citadel in its competitive set





### Objective 4.3

#### *Expand the Veteran Population*

The Citadel values the service of America's veterans and believes that veteran students can serve as powerful role models throughout the campus environment. During the next 3 years, the institution plans to:

- Establish a new Veteran's Program at The Citadel
- Implement specifically designed marketing and recruitment campaigns

#### **Key Performance Indicators:**

- Increase the veteran student population at The Citadel

### Objective 4.4

#### *Expand Student Diversity and Sustain an Enrollment of 2,135 in the Corps of Cadets*

Citadel graduates work, serve, and reside in diverse environments. The prospects for their success as educated and principled leaders are enhanced by exposure to diverse perspectives, interpretations, and points of view. In addition to academic and leadership scholarships, and in recognition that diversity enriches the educational environment, The Citadel is also committed to:

- Expand efforts to recruit, support and sustain students from diverse cultures, faiths, and backgrounds
- Increase needs-based and athletic scholarship funding

#### **Key Performance Indicators:**

- Increased needs-based and athletic scholarship funding
- Expanded student diversity
- Sustained enrollment of 2,135 in the Corps of Cadets





# 5

## Strategic Initiative Five

### *Enhance the Facilities and Technological Support for the Campus*

Institutional planning is integral in facilitating a progressive transformation of the campus grounds, facilities, and technologies, enabling the College to achieve its mission and vision. We must position The Citadel to capitalize on opportunities and create synergies between technologies and physical structures as well as facilitating a master landscape plan that builds connections throughout campus and projects the most appreciable image for the public.

#### Objective 5.1

##### *Refined Campus Master Plan to Guide Strategic Decisions*

The Citadel's Campus Master Plan will establish overarching goals and design principles, providing a framework for future development. And, in support of an enhanced learning environment, the plan will also guide long range planning for the architectural character, construction, environmental issues, maintenance, land use and acquisition, landscape, and parking. We will:

- Develop a campus growth strategy that sets priorities for alternatives in the campus master plan
- Pursue public-private partnerships to implement a multi-phased Citadel faculty and staff housing project and expand parking capacity on The Citadel campus

##### **Key Performance Indicators:**

- Campus Master Plan aligns with Campus Strategic Plan and provides a priority list of facility efforts
- Expand parking and faculty/staff housing capacity on The Citadel campus

#### Objective 5.2

##### *Develop a Feasibility Study and Construction Plan for a New Capers Hall*

Capers Hall, constructed in 1951, houses six of The Citadel's fourteen academic schools and departments. The College recognizes the need for a new, expanded state of the art learning facility. During the next 3 years, the institution will:

- Develop architectural, design, and construction documents

##### **Key Performance Indicators:**

- Completion of all planning documents



### Objective 5.3

#### *A Renovated Daniel Library at The Citadel*

The Daniel Library, a core element of the campus educational experience, will be renovated to include upgraded meeting facilities and technological innovations. We will proceed with:

- Implementation of architectural design/construction plans

##### **Key Performance Indicators:**

- Renovation completion on time and on budget

### Objective 5.4

#### *Decrease Campus-wide Deferred Maintenance*

Mounting deferred maintenance costs present a challenge to most higher education institutions. The Citadel recognizes the need to decrease campus-wide deferred maintenance. To meet this goal, we will:

- Budget for deferred maintenance

##### **Key Performance Indicators:**

- Decrease amount of deferred maintenance

### Objective 5.5

#### *Implementation of a “Unified Digital Campus”*

Implementation of a “Unified Digital Campus” will expand the institution’s analytical reporting capabilities, increase efficient inter-departmental communications. Improving our technology operations will provide easy, rapid access to operational and historic data for decision support and overall customer service internally and for our student population. We will pursue:

- Implementation of Banner Enterprise Information System, Luminis Portal, Operational Data Store, and Enterprise Data Warehouse

##### **Key Performance Indicators:**

- Increased data access and usage
- Enhanced analytical reporting capabilities
- Improved cross-departmental workflow and data transfer



## Objective 5.6

### *Enhance the Cadet Information System*

The Cadet Information System is an integral component of the Leader Development Model, facilitating integration of information across all four pillars. To examine the holistic Citadel Experience of each cadet, the institution must build the following components within the Enterprise Information System:

- Build the Discipline System, Attendance Tracking, and Infirmary modules within Banner.
- Create a Four Pillars Accountability System and Interface, including the Cadet Record Brief.

#### **Key Performance Indicators:**

- Integration of data from the four pillars that comprise The Citadel Experience.

## Objective 5.7

### *Connectivity to SC Light Rail and Internet 2*

To maintain a competitive edge, The Citadel must capitalize on collaboration opportunities with other higher education institutions. The Citadel plans to:

- Establish service level agreements with SC Light Rail, MUSC and College of Charleston
- Establish a fiber optic connection from The Citadel ITS facilities in Bond Hall to the MUSC facilities in Harborview Tower

#### **Key Performance Indicators:**

- Increase research and collaborative opportunities for faculty
- Increase stability of data center facilities to eliminate down time due to environmental conditions

## Objective 5.8

### *Develop the Institution's Online Education Capabilities to Support Teaching and Learning*

The Citadel will invest in expanding online educational opportunities. During the next 3 years, The Citadel will:

- Engage the Information Technology committee to plan for delivering expanded online educational offerings, and to identify target degree programs, courses, and online material
- Offer incentives and support for faculty members to develop online courses
- Develop and implement a marketing plan to promote the online education platform

#### **Key Performance Indicators:**

- Increase graduate student enrollment in online courses by 10% each year
- Expanded online curriculum





## 6 Strategic Initiative Six

### *Improve Institutional Effectiveness*

The Citadel is committed to advancing a culture of assessment and continuous improvement within the campus environment. In this era of increasing accountability at all levels in higher education, The Citadel is taking measurable steps to demonstrate student achievement and the use of assessments in our improvement efforts. Objectives designed to improve institutional effectiveness include promoting a culture of assessment and continuous improvement, automating assessment and planning processes, and increasing awareness of environmental and sustainability best practices.

#### ► Objective 6.1

##### *Foster a Culture of Assessment and Continuous Improvement Within the Campus Community*

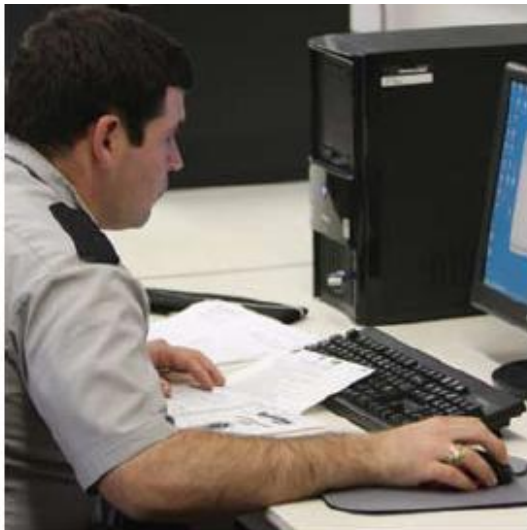
The Citadel recognizes that effective assessment requires collaborative, campus-wide involvement. The College will use a variety of new actions to foster this wide-spread engagement:

- Construct an assessment plan that supports institution, program, and course-level assessment practices
- Create an Assessment Award Program, recognizing faculty, department, and support services that use innovative assessment techniques and demonstrate evidence of using data for continuous improvement
- Establish a Faculty Analysis and Assessment Team, supporting a small team of faculty to participate in specialized evaluation projects and provide assessment outreach to other areas of the College
- Increase support for faculty and staff assessment and realize new professional development opportunities

##### **Key Performance Indicator:**

- Increased faculty and staff engagement in assessment and continuous improvement efforts





## Objective 6.2

### *Automate the Strategic Planning, Assessment, Accreditation, and Program Evaluation Processes*

The Citadel will increase its emphasis on automating processes central to institutional effectiveness. The College will:

- Purchase and implement Accountability Management Software to automate strategic planning, assessment, accreditation, metric, and program evaluation processes

#### **Key Performance Indicator:**

- Increase number of faculty members engaged in assessment and strategic planning processes

## Objective 6.3

### *Increase awareness of sustainability and environmental issues, and adopt best practices to manage them*

The Citadel recognizes the importance of increasing awareness and best practices to address environmental issues and will take the following actions:

- Create "company environmental officers" within the Corps of Cadets to coordinate recycling and energy savings measures in the barracks and implement an environmental awareness education campaign
- Adopt LEED-standards for new buildings and renovation and gradually substitute sustainable energy measures
- Increase the number of "paperless" offices on campus through the implementation of a document imaging system

#### **Key Performance Indicators:**

- Increase environmental awareness throughout the campus community
- Increase the number of paperless offices by 10%





# 7

## Strategic Initiative Seven

*Ensure the College has the Leadership and Talent to Accomplish These Strategic Initiatives*

The quality of the leadership, learning, and service environment depends on the knowledge and skills of our faculty and staff. Therefore, efforts to enhance the quality of The Citadel Experience must include the continuous, measurable development of our employees. During the next 3 years, The Citadel will implement actions that will help us to recruit and retain a diverse workforce, increase professional development opportunities, and expand the number of qualified personnel supporting the institution's Leader Development Model.

### Objective 7.1

#### *Recruit and Retain a Diverse Faculty and Staff*

The Citadel firmly believes that diversity enriches the educational environment and promotes personal growth. Acting on this belief, The Citadel will implement the following strategies:

- Establish a diversity recruitment team to identify strategies to expand the diversity of faculty and staff
- Sustain a commitment to conducting faculty and staff salary studies

#### **Key Performance Indicator:**

- Increase diversity among faculty and staff

### Objective 7.2

#### *Expand the Number of Qualified Personnel Able to Coach, Teach, Train and Mentor Units and Individuals Across the Four Pillars*

The Citadel's Leader Development Model integrates the academic, physical, moral and ethical, and military pillars of The Citadel Experience. The following actions are central in driving further integration of these domains:



- Expand and integrate Commandant and faculty staffing to support the Leader Development Model
- Sustain and improve company-level integration teams
- Create a series of endowed athletics positions

**Key Performance Indicators:**

- Increase retention rates of high performing staff
- Enhance leadership learning outcomes

### Objective 7.3

#### *Establish a Faculty Enhancement Program*

The Citadel values faculty contributions in teaching, scholarship, and service and aims to enhance institutional support through the following actions:

- Expand the faculty development program to fund opportunities to develop faculty expertise
- Create a named professorship to be rotated on a competitive basis among current members of the faculty

**Key Performance Indicators:**

- Establish faculty productivity goals within each academic school
- Increase faculty morale
- Attract high-quality prospective faculty members

### Objective 7.4

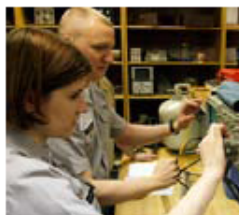
#### *Develop a Technology Based Professional Development Program to Enhance the Skills of The Citadel's Administrative Workforce*

As technology advances, it becomes critical to develop processes and programs to advance employee skills. Several techniques for addressing technology advances include:

- Infuse technology requirements into position descriptions and develop training sessions to enhance technology skills
- Develop content and implement new web-based training management program

**Key Performance Indicators:**

- Technology infusion in position descriptions
- Increase technical skills training with documented advancement





# 8

## Strategic Initiative Eight

*Provide Outreach to the Region and Serve as a Resource in its Economic Development*

The Citadel's commitment to economic development, organizational partnerships, and community-based service is well demonstrated by engagement in a wide spectrum of outreach and volunteer activities. The College will strengthen its leadership role in the economic development of the Lowcountry. The Citadel will focus on coordinating outreach and economic development activities, expanding partnerships, and developing specialized research and training programs for public, private and non-profit organizations.

### Objective 8.1

#### *Coordinate Institutional Outreach and Economic Development Activities*

As the The Citadel continues to expand its engagement with the community and business organizations, it is critical to coordinate and centralize community outreach and economic development activities. To evolve the process, we are planning to:

- Create an office for Outreach and Economic Development within The Citadel Graduate College
- Identify current activities and efforts and research new opportunities for outreach and economic development

#### **Key Performance Indicator:**

- Complete inventory of current outreach and economic development activities

### Objective 8.2

#### *Expand Partnerships with Business and Community Organizations*

Collaboration and partnerships with business and community organizations will strengthen The Citadel and exert a major influence on the region's economic development. Specific actions the institution has identified include:

- Expand faculty, staff, and graduate student consulting activities
- Explore opportunities for joint ventures and generation of new revenue streams
- Expand participation of faculty and staff in community-based organizations

#### **Key Performance Indicator:**

- Number of faculty, staff, and graduate students engaged in community-based organizations and consulting opportunities



### Objective 8.3

#### *Develop Specialized Research and Training Programs for Public, Private, and Non-Profit Organizations*

The Citadel's faculty and staff possess valuable expertise in a wide array of disciplines. The College will focus on refining its ability to develop knowledge transfer programs to aid public, private, and non-profit organizations. Specific actions will include:

- Conduct a needs assessment of public, private, and non-profit organizations
- Develop programs to address identified needs

#### **Key Performance Indicators:**

- Number of new programs under development



#### **Attachment IV. New Tenure-Track Faculty 2009-2010**

CPT Keith J. Bell, Assistant Professor of Criminal Justice  
B.A., Wheeling Jesuit University  
M.S., Marshall University  
Ph.D., Indiana University of Pennsylvania

CPT Scott E. Buchanan, Assistant Professor of Political Science  
A.B., University of Georgia  
M.A., Auburn University  
Ph.D., University of Oklahoma

CPT William B. Collins, Assistant Professor of Political Science  
B.A., Wake Forest University  
M.A., University of London  
A.B.D., Claremont Graduate University

CPT David M. Donnell, Assistant Professor of Biology  
B.S., California State University, Chico  
Ph.D., University of Arizona

LTC Michael J. Fekula, Associate Professor of Business Administration  
B.S., Lehigh University  
M.B.A., University of Wyoming  
Ph.D., The Pennsylvania State University

CPT Amanda R. Mushal, Assistant Professor of History  
B.A., College of William and Mary  
M.A., Ph.D., University of Virginia

CPT Robert J. Riggle, Assistant Professor of Business Administration  
B.A., M.B.A., Henderson State University  
Ph.D., University of South Florida

CPT Claudia Lucia Rocha, Assistant Professor of Biology  
B.S., Universidad de Los Andes  
Ph.D., Medical University of South Carolina

CPT Genelle K. Sawyer, Assistant Professor of Psychology  
B.A., University of Rochester  
M.A., Ph.D., University of Nebraska

CPT Luke S. Sollitt, Assistant Professor of Physics  
B.A., B.S., University of Maryland  
Ph.D., California Institute of Technology

CPT Kathryn Strong, Assistant Professor of English  
B.A., M.A., University of North Texas  
M.A., Ph.D., University of Southern California

## Accountability Report Appropriations/Expenditures Chart

### Base Budget Expenditures and Appropriations

Major Budget Categories	FY 07-08 Actual Expenditures		FY 08-09 Actual Expenditures		FY 09-10 Appropriations Act	
	Total Funds	General Funds	Total Funds	General Funds	Total Funds	General Funds
Personal Service	\$ 37,295,474	\$ 13,323,600	\$ 38,488,328	\$ 10,337,032	\$ 42,877,711	\$ 10,337,032
Other Operating	\$ 59,074,737		\$ 62,985,435		\$ 72,599,459	
Special Items	\$ 577,695		\$ 499,538		\$ 2,161,240	
Permanent Improvements						
Case Services						
Distributions to Subdivisions						
Fringe Benefits	\$ 10,237,617	\$ 2,964,140	\$ 10,858,843	\$ 2,010,116	\$ 11,038,078	\$ 2,010,116
Non-recurring						
<b>Total</b>	\$ 107,185,523	\$ 16,287,740	\$ 112,832,144	\$ 12,347,148	\$ 128,676,488	\$ 12,347,148

### Other Expenditures

Sources of Funds	FY 07-08 Actual Expenditures	FY 08-09 Actual Expenditures
Supplemental Bills		
Capital Reserve Funds	\$ 1,600,000	
Bonds		

### Major Program Areas

Program Number and Title	Major Program Area Purpose (Brief)	FY 07-08 Budget Expenditures	FY 08-09 Budget Expenditures	Key Cross References for Financial Results*
I. Scholarships and Fellowships 332	Includes expenditures for grants to students selected by the institution and financed from current funds, restricted or unrestricted. Also, includes Direct Lending Program funds.	<b>State:</b> <b>Federal:</b> 16,591,697.00 <b>Other:</b> 12,011,211.00 <b>Total:</b> 28,602,908.00 <b>% of Total Budget:</b> 26%	<b>State:</b> <b>Federal:</b> 18,252,035.00 <b>Other:</b> 13,559,735.00 <b>Total:</b> 31,811,770.00 <b>% of Total Budget:</b> 28%	7.5-1, 7.5-1a
II. Auxiliary Enterprises 333 - 344	Furnishes goods or services to students, faculty, or staff, and charges a fee directly related to, although not necessarily equal to, the cost of the goods or services.	<b>State:</b> <b>Federal:</b> <b>Other:</b> 27,766,647.00 <b>Total:</b> 27,766,647.00 <b>% of Total Budget:</b> 26%	<b>State:</b> <b>Federal:</b> <b>Other:</b> 28,333,235.00 <b>Total:</b> 28,333,235.00 <b>% of Total Budget:</b> 25%	Captured within 7.3-1, 7.3-1a
I. Instruction 319 - 325	Expenditures for institutional instruction programs for all credit and non-credit courses to include occupational and vocational instruction, and for regular, special, and extension sessions.	<b>State:</b> 13,411,666.00 <b>Federal:</b> <b>Other:</b> 8,667,328.00 <b>Total:</b> 22,078,994.00 <b>% of Total Budget:</b> 20%	<b>State:</b> 11,097,148.00 <b>Federal:</b> <b>Other:</b> 10,960,537.00 <b>Total:</b> 22,057,685.00 <b>% of Total Budget:</b> 20%	7.4-1, 7.4-2
I. O&M of Plant 331	Operating funds for the operation and maintenance of the physical plant including services and maintenance related to grounds and facilities.	<b>State:</b> 1,600,000.00 <b>Federal:</b> <b>Other:</b> 7,661,890.00 <b>Total:</b> 9,261,890.00 <b>% of Total Budget:</b> 9%	<b>State:</b> <b>Federal:</b> <b>Other:</b> 8,707,622.00 <b>Total:</b> 8,707,622.00 <b>% of Total Budget:</b> 8%	7.5-2
I. Institutional Support 330	Includes central executive-level activities, fiscal operations, administrative data processing, space management, employee personnel and records, logistic activities, and support	<b>State:</b> 140,000.00 <b>Federal:</b> 15,000.00 <b>Other:</b> 6,684,842.00 <b>Total:</b> 6,839,842.00 <b>% of Total Budget:</b> 6%	<b>State:</b> 140,000.00 <b>Federal:</b> 15,000.00 <b>Other:</b> 7,211,161.00 <b>Total:</b> 7,366,161.00 <b>% of Total Budget:</b> 7%	7.6-1, 7.6-2, 7.6-3

**Below: List any programs not included above and show the remainder of expenditures by source of funds.**

Academic Support (328), Student Services (329), Public Services (327), and Research (326).

<b>Remainder of Expenditures:</b>	<b>State:</b> 2,736,074.00 <b>Federal:</b> 272,543.00 <b>Other:</b> 11,226,625.00 <b>Total:</b> 14,235,242.00 <b>% of Total Budget:</b> 13%	<b>State:</b> 1,110,000.00 <b>Federal:</b> 217,901.00 <b>Other:</b> 13,227,770.00 <b>Total:</b> 14,555,671.00 <b>% of Total Budget:</b> 13%
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\* Key Cross-References are a link to the Category 7 - Organizational Performance Results. These References provide a Chart number that is included in the 7th section of this document.

## Strategic Planning

Program Number and Title	Supported Organization Strategic Planning Goal/Objective	Related FY <u>08-09 and beyond</u> Key Action Plan/Initiative(s) and Timeline for Accomplishing the Plans()	Key Cross References for Performance Measures*
I. Scholarships and Fellowships 332	Strategic Initiatives: 1, 2, 4, and 8 (See Attachment 3, p46)	Objectives: 1.1, 2.1, 2.2, 2.3, 4.1, 4.3, 4.4, 8.2 Timeline: 2009-2012 (See Attachment 3)	7.5-1, 7.5-1a
II. Auxiliary Enterprises 333 - 344	Strategic Initiatives: 6 (See Attachment 3, p46)	Objectives: 6.3 Timeline: 2009-2012 (See Attachment 3)	Captured within 7.3-1, 7.3-1a
I. Instruction 319 - 325	Strategic Initiatives: 1, 2, 6, 7 and 8 (See Attachment 3, p46)	Objectives: 1.1, 2.1, 2.2, 2.3, 6.1, 6.3, 7.2, 7.3, 8.3 Timeline: 2009-2012 (See Attachment 3)	7.4-1, 7.4-2
I. O&M of Plant 331	Strategic Initiative: 5 (See Attachment 3, p46)	Objectives: 5.1, 5.2, 5.3, 5.4 Timeline: 2009-2012 (See Attachment 3)	7.5-2
I. Institutional Support 330	Strategic Initiatives: 1, 2, 4, 5, 6, 7 and 8 (See Attachment 3, p46)	Objectives: 1.2, 4.1, 4.2, 4.4, 5.5, 7.3 Timeline: 2009-2012 (See Attachment 3)	7.6-1, 7.6-2, 7.6-3
Academic Support	Strategic Initiatives: 1, 2, 6 and 8 (See Attachment 3, p46)	Objectives: 1.1, 2.1, 2.2, 2.3, 6.1, 8.3 Timeline: 2009-2012 (See Attachment 3)	7.1-1, 7.1-1b, 7.1-2
Student Services	Strategic Initiatives: 1 and 2 (See Attachment 3, p46)	Objectives: 1.2, 1.5, 2.1, 2.2, 2.3 Timeline: 2009-2012 (See Attachment 3)	7.2-1, 7.2-2

\* Key Cross-References are a link to the Category 7 - Organizational Performance Results. These References provide a Chart number that is included in the 7th section of this document.