



COLORADO STATE UNIVERSITY-PUEBLO

EXECUTIVE SUMMARY: Investing in CSU-Pueblo WORKS

What are CSU-Pueblo University Goals for FY20?

- Increased Enrollment
- Increased Student Success
- Increased Employee Satisfaction

These 2019 university goals were established by the cross-functional and inclusive University Leadership Team — with input and feedback from the Vision 2028 Steering Committee team members. These “Wildly Important Goals” (WIGs) map back to our leading indicators, the 10 first phase “Vision 2028 Initiatives.” These first 10 initiatives will be implemented through Fiscal Year 2022 with a \$7.793 million investment from the CSU System Board of Governors.

What are the Goals of Vision 2028?

- Reposition CSU-Pueblo as a responsive regional university
- Drive enrollment
- Embed a differentiated student experience
- Establish a vibrant culture that can sustain the vision of the institution
- Create innovative and agile market and research-driven practice, informed by consistent data
- Institute financial sustainability, FY29: Close the “prosperity gap” — add \$10 million to base budget over 9 fiscal years

TO VIEW THE VISION 2028 DATA & RESEARCH DASHBOARD: https://public.tableau.com/profile/maureen.o.keefe7005#!/vizhome/Vision2028/3_TrackCenters

What Has Been CSU-Pueblo’s Visioning Process?

- The President’s Charge, July 2017
Charging a Vision 2028 Team
- Conceptualization
Engaging the Campus and Community, May 2018-October 2018
- Operationalization
Planning the Phase 1, Top 10 Initiatives, October 2018-February 2019
- Execution
Vetting and Validating the Initiatives, February 2019-July 2019
Establishing the University Goals for AY 2019
Creating the Student Experience, June-July 2019 [Ongoing]

What is the New Undergraduate Student Experience?

- Experiential Learning
- Expanded Work Study Opportunities (Financial Aid Model)
- Individualized Pathways and Personalized Coaching
- Wrap-around Advising Services and Faculty Mentorship
- Embedded Soft Skills Development
- Apprenticeships, Internships, and Capstone Experiences

CSU-Pueblo's new student experience will become a key differentiator in a crowded higher education marketplace. This multi-pronged student success model will be designed around an increasing need to embed research-based practice in all campus wide "student-readiness" efforts. This experience will be built on information and data developed from official CSU-Pueblo reporting models and from Colorado higher education and economic development reports. The new student experience will allow CSU-Pueblo to be responsive to the needs of new student markets and will serve as our most marketable, signature enrollment driver.

What are the Enrollment Drivers?

- The New Student Experience: *establishes a marketable student-readiness model*
- University Tracks Centers: *targets and serves a regional market of undergraduate students*
- Adult Learning: *recruits and serves new student markets*
- CSU-Pueblo Professional: *offers market-driven, online graduate education and certificate programs*

What is Needed in Order to Support Vision 2028?

Two distinct areas must be supported in order to fully launch Vision 2028. Part 1 is the infrastructure and change management that will drive external funding and oversee this project. Vision 2028 funding and operations will function completely outside of normal university budgeting and E&G accounting. The second area, Part 2, is designed to drive enrollment, retention, graduation, and placement through our work on a series of 10 distinct initiatives — seven of these with system funding.

PART 1: Project Management, Accountability, and Implementing Change

Part one of this change management and accountability plan will create an infrastructure that will oversee both the program and financial responsibility of the day to day work of visioning. Part 1 was designed to seek out and manage external opportunities and fundraising efforts as long-term financial drivers that will increase CSU-Pueblo's capacity to 1) ensure that the first two years of visioning remain on track and on budget, and 2) increase the university's ability to strategically plan longer-term projects. This part of the proposal also includes developing robust ongoing communication to the system, the Board of Governors, the Office of the Chancellor, and to university leadership and other stakeholders across the region. This project management team will establish a "project manual" in consultation with the CSU System CFO, the financial consultant, and the President of CSU-Pueblo.

PART 2: The Seven Initiatives

The first of the initiatives, a **New Financial Aid Model**, is crucial to CSU-Pueblo's need to increase access and affordability for all students. This initiative creates an employer incentive and shared responsibility model that allows our students to work off campus in roles designed to develop professional (soft) skills and/or that map to academic and career goals. The second initiative, **Athletics**, acknowledges the ongoing recruitment successes of our athletics programs, and ensures that athletic spaces and budgets meet current and future student (and campus) needs. The third initiative, the **University Tracks Centers**, is an outreach effort across the region that is designed to create and sustain a college going culture in Pueblo and beyond, and to enroll students at regional high-need high schools at CSU-Pueblo. The fourth initiative, **Advising**, will support all of the vision work by allowing CSU-Pueblo to offer students individualized pathways to success — as new freshmen, transfer students, returning students, or graduates — through personalized boutique "coaching" experiences that will, over time, adopt a 4-year complete advising model. The sixth initiative, **Adult Learning** (the 5th for which we are requesting system support) will allow us to recruit and retain a new — but increasingly growing — student demographic: adult learners. These students are over the age of 25, have no college, some college, or a need to upskill through learning additional skills, gaining new experiences, or completing new undergraduate degrees. More than 60% of our current CSU-Pueblo adult learners are identified as high economic need, or Pell-eligible (compared to 42% of traditionally aged undergraduates). The seventh initiative, **General Education and Capstone Curricular Redesign**, is a crucial component to the new student experience. This work will allow CSU-Pueblo to embed soft skills in introductory, knowledge-building coursework and,

through capstone experiences, will connect student work (apprenticeships, internships, and work study) throughout a co-op model for academic credit and work. The tenth initiative, **CSU-Pueblo Professional** (the 7th of this list), is a suite of new, online, market-driven graduate and certificate programs.

FIGURE 1: The Aggregate Budget

The “Aggregate Budget,” below, outlines new full time equivalent (FTE) and the expense for each initiative, per fiscal year, with an aggregate budget request of \$7,793,773.

Aggregate Budget*	FTE YR. 1	FTE YR. 2	FY 20	FY 21
PROJECT MANAGEMENT			\$768,300	\$810,803
New FTE	4	2		\$1,579,103
Initiative 1: Financial Aid Model			\$282,600	\$287,667
New FTE	2	0		\$570,267
Initiative 2: Athletics			\$1,927,259	\$62,035
New FTE	1	0		\$1,989,294
Initiative 3: University Tracks Centers			\$194,100	\$329,709
New FTE	3	1		\$523,809
Initiative 4: New Advising Model			\$534,100	\$1,007,500
New FTE	5	4		\$1,541,600
Initiative 6: Adult Learning			\$390,600	\$195,600
New FTE	0	2		\$586,200
Initiative 7: GenEd/Capstone Redesign			\$223,700	\$391,200
New FTE	2	1		\$614,900
Initiative 10: CSU-Pueblo Professional			\$194,300	\$194,300
New FTE	3	0		\$388,600
NEW FTE PER YEAR	20	10		TOTAL FTE: 30
ANNUAL TOTALS			\$4,514,959	\$3,278,814
TOTAL INVESTMENT				\$7,793,773

Fig. 1. See May 2019 Board Documents, “Appendix” for additional research, supporting documentation, detailed budgets, and accompanying recommended budget narrative for each initiative.

The Project Management Tool

The “Project Management Plan,” **Appendix A** (see attached), provides a detailed tool that will be the guide for program implementation, fiscal accountability, and enrollment metrics. This tool outlines the leading indicators (initiatives), associated costs, and the lagging indicators (WIGs) to enrollment goals by fiscal year. This tool maps new student targets (beyond budgeted headcount) to their associated revenues, outlines a 30% indirect cost that will go back to CSU-Pueblo’s operational (“E&G”) budget, and

details the net revenues that will continue to fund initiatives 5, 8, and 9 — and ongoing efforts to institutionalize the first seven system-funded initiatives. Each new student is calculated at \$9595 in revenue. Assumptions and variables include: 1) Total enrollment growth of 29% over 9 fiscal years; 2) State funding remains at current level; 3) Tuition remains flat (no increases or new, discounted rates); 4) Retention remains consistent at 70% after FY21; 5) Retention impact of 84% of total new enrollment FY21-FY23 (n=21, 42, and 63); 6) FY24 retention impact of 63%, FY25 retention impact fo 42%, FY26 31%, an FY27-29 at 25% (n=63 FY23-FY29).

The Two Year Implementation Timeline

The two year implementation timeline outlines the scheduling and planned launch of each initiative and includes the implementation of the project management team.

2 YEAR IMPLEMENTATION TIMELINE		
PROJECT	FY 2020	FY 2021
Project Management / \$1,579,103		
\$241,200 / \$248,436	Appoint Project Director / Admin Assistant	
0 / \$82,812		Hire Grants Writer
\$147,400 / \$303,644	Hire 1 Gift Officer	Hire 2nd Gift Officer
\$73,700 / \$106,911	Hire Employer Relations Specialist	Expand Employee Relations, Covey
\$50,000 / \$50,000	Establish Financial Consultant Contract	Financial Consulting
\$100,000 / \$100,000	Write Program Manual with System CFO / Marketing #Vision2028	Comprehensive Marketing Campaign
0 / \$75,000	Solicit Bids for Technology Audit	Complete Technology Audit
I1: Financial Aid Model / \$570,267		
\$73,700 / \$75,911	Hire Placement Coordinator	
\$46,900 / \$49,756	Hire .5 Processor	
\$162,000 / \$162,000	Begin Employer Incentive Program	Expand Employer Incentive Program
	Build Employer Relationships	Launch Expanded Work Study Model
I2: Athletics / \$1,989,294		
\$62,035 / \$62,035	Hire F/T Budget Manager	
	Update Bids on Track Renovation	
\$702,642 / \$10,000	Purchase & Install Audio/Visual for Massari	Maintenance
\$1,162,582	Begin Track Renovation, including Concrete & Apron Repairs	Track Renovation Complete
I3: University Tracks Centers / \$523,809		
\$40,000 / \$80,000	Expansion, 1 Site	Expansion, 2 Sites

2 YEAR IMPLEMENTATION TIMELINE

\$60,300 / \$62,109	Hire UTC Director	
\$46,900 / \$96,614	Hire 1 Coordinator	Hire 1 Coordinator
\$46,900 / \$49,756	Hire Processor	
0 / \$41,230	Launch Peer Mentor Program	Expand Peer Mentorships
I4: New Advising Model / \$1,541,600		
\$214,400 / \$428,800	Hire 4 Success Coaches	Hire 4 Success Coaches
0 / \$115,000		Purchase Software
\$174,000 / \$174,000	Launch Faculty Mentorships	Expand Faculty Mentorships
\$73,700 / \$73,700	Hire SAI/Mentoring Director	
\$72,000 / \$216,000	Hire Peer Mentors	Expand Peer Mentorships
I6: Adult Learning / \$586,200		
\$73,700 / \$73,700	Hire Adult Learning/ PLA Coordinator	
\$46,900 / \$46,900	Campus Phone Systems	
\$50,000 / \$120,000	Establish Tech Support Needs	Tech Needs / Purchase Software
\$50,000 / \$75,000	Faculty Stipends for PLA Review	Expand Faculty Stipends for PLA Reviews
0 / \$50,000	Explore After Hours Support Needs	Expand After Hours Support Needs
I7: General Ed & Capstone Redesign / \$614,900		
\$73,700 / \$73,700	Hire Instructional Designer	
0 / \$93,800		Hire OER Director
\$100,000 / \$100,000	Buy-out Faculty Program Directors	Expand Buy-out Faculty Program Directors
\$50,000 / \$100,000	Faculty Reassigned Time for New Course Design	Buy-out Faculty Program Directors
0 / \$73,700		Hire Capstone Coordinator
I10: CSU-Pueblo Professional / \$388,600		
\$73,700 / \$73,700	Hire Graduate Enrollment Coordinator	
\$73,700 / \$73,700	Hire Instructional Designer	
\$46,900 / \$46,900	Hire Processor	