

IMPLEMENTING VISION 2028: Colorado State University-Pueblo Works

August 2019 Board of Governors Meeting

Timothy Mottet | Donna Souder Hodge



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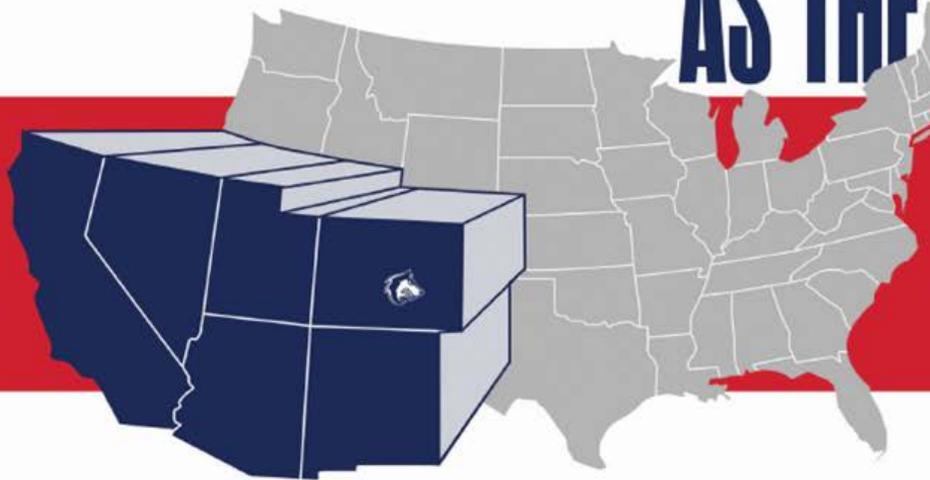
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“It is not unusual for small-to-medium-sized institutions to find prosperity gaps requiring \$10 million of annual operating margin or more, and boards are usually surprised at the level of revenue growth required to close the prosperity gap. Knowing the distance of your journey to reach prosperity is critical, and board leadership should be an integral part of the discovery process...”

–from “Bridging the Prosperity Gap,” Rick Beyer, pg. 12
Trusteeship, May/June 2019



VISION TO ESTABLISH
COLORADO STATE UNIVERSITY-PUEBLO
AS THE PEOPLE'S UNIVERSITY



OF THE SOUTHWEST
UNITED STATES
BY **2028**

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WHAT ARE THE 10-YEAR GOALS OF VISION 2028?

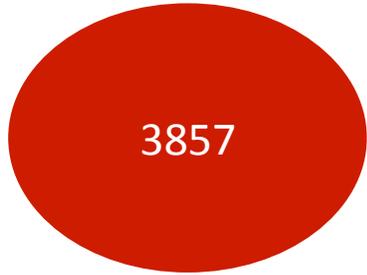
- Reposition CSU-Pueblo as a responsive regional university
- Drive enrollment
- Embed a differentiated student experience
- Establish a vibrant culture that can sustain the vision of the institution
- Create innovative and agile market and research-driven practice, informed by consistent data
- Institute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



Current State, FY20

Future State, FY29

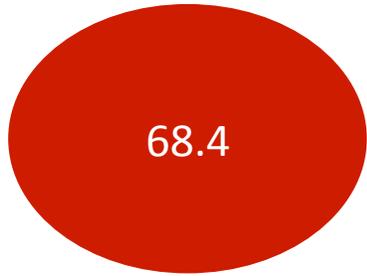
Enrollment



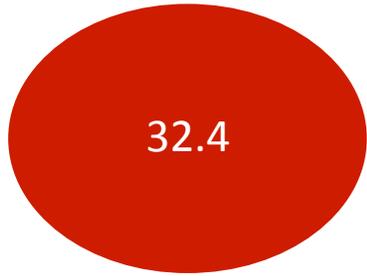
VISION 2028



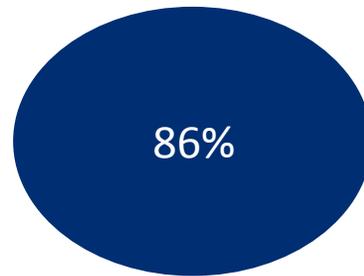
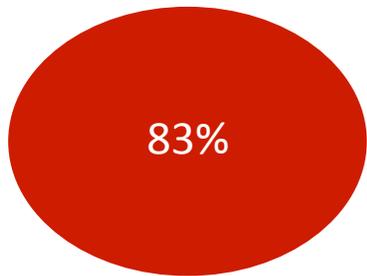
Retention



Graduation



Placement



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“...the purpose of a 5-10 year planning cycle... allows more complex solutions to be spread out over a longer period of time.”

–from “A Practical Guide to Strategic Planning in Higher Education,” Karen E. Hinton, pg. 11
Society for College and University Planning



STRATEGIC INITIATIVES

New Financial Aid Model

Athletics

Track Centers

New Advising Model

CSU-Pueblo at Colorado Springs

Adult Learning Program

General Education and Capstone Curricular Redesign

Professional Learning Spaces

Downtown Presence

CSU-Pueblo Professional

LEADING INDICATORS



ACCESS & AFFORDABILITY



EXPERIENCES



ENVIRONMENTS



PEOPLE

LAGGING INDICATORS

ENROLLMENT

RETENTION

COMPLETION

PLACEMENT

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GROUP 1: Infrastructure & Revenue Generation

Group 1 initiatives (**Project Management**; Initiative 1: **Financial Aid**; Initiative 2: **Athletics**) create the infrastructure necessary to guide the project, build capacity, and seek out new external partners and revenues, including:

- 1) Project Management Team
- 2) Grant Writer and 2 Gift Officers
- 4) Financial Consultant for the Project
- 5) Technology Audit
- 6) “Kick Start” Marketing for FY20 and 21
- 7) Apprenticeship/Work Study Program
- 8) Revenue Generating Audio/Visual Equipment for Massari Arena
- 9) Athletics Facilities and Budget Officer

TOTAL 2-YEAR INVESTMENT, FY20 & FY 21 = \$4,138,664

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DLR Group H.W. Houston Construction WEMBER CSU PUEBLO - PSYCHOLOGY BUILDING - EXTERIOR RENDERING



Project Management: Research Brief

From “[A Practical Guide to Strategic Planning in Higher Education](#)” published by the Society for College and University Planning (2012) by Karen E. Hinton, Ph.D.:

“What is incumbent on the members... is to ensure that the transformational aspects of the vision are captured in the goals and objectives and phasing is realistic for implementation. It is important to remember that the ultimate purpose... is to drive resource allocation. If the institution has a vision requiring additional resources, it phases implementation of that vision over time, including securing the resources to make it happen,” (pg. 12).

“An institution that uses its planning process as a tool to integrate decisions and long-range thinking helps itself stay focused, directs its resources, and controls its future,” (pg. 32).

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A New Financial Aid Model: Research Brief

From “[The Future\(s\) of Public Higher Education](#)” published by Deloitte Insights (Oct. 23, 2018) by Jeff Selingo, Dave Noone, and Cole Clark:

“...integrate work experiences deeply into the curriculum, with students toggling between long stretches in the classroom and the work world related to their area of study. This... gives employers a chance to evaluate students for potential fit before committing to hiring them for a full-time position. Because the work experiences in this model would be closely tied to the state’s economic development priorities—and its emerging job market—it would likely enjoy strong support in the legislature, which could use the system as another incentive to recruit new businesses to the state...”

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Athletics Infrastructure: Research Brief

Data from “[The Dynamic Advertising Effect of Collegiate Athletics](#),” Doug Chung, Ph.D. (Harvard, 2019), on how investments in athletics can benefit universities by increasing both the quantity and quality of students we can expect to attract:

- When a university’s athletics programs rise in stature and recognition... applications increase by 18.7 percent.
- To attain similar effects, a school would have to lower tuition by 3.8%.
- Students with lower-than-average SAT scores tended to have a stronger preference for schools known for athletic success, while students with higher SAT scores preferred institutions with greater academic quality. Also, students with lower academic prowess valued the success of intercollegiate athletics for longer periods of time than the high SAT achievers.
- Even students with high SAT scores are significantly affected by athletic success.
- Schools become more academically selective with athletic success.

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GROUP 2: Student Experience & Retention

Group 2 initiatives (Initiative 4: **New Advising Model** and Initiative 7: **General Education and Capstone Curricular Redesign**) support efforts to retain students and provide invasive support services. Curricular redesign differentiates the student experience and ensures that work experiences are closely aligned with academic efforts across all 4-year, academic degree programs. This group includes:

- 1) 8 New Student Success “Coaches”
- 2) Peer Mentor Program
- 3) Advising Software
- 4) Supplemental Academic Instruction (SAI) and Mentor Director
- 5) Instructional Designers
- 6) Faculty Time & Effort

TOTAL 2-YEAR INVESTMENT, FY20 & FY 21 = \$2,156,500

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“Services are the new campus amenities... Convenient access to career development, tutoring, advising, and mental-health resources.”

–from “The New Generation of Students,” Jeff Selingo, pg. 15
The Chronicle of Higher Education

“Focus(ed) on ways of thinking: this sometimes subtle shift in approach moves general education away from a collection of survey courses designed as an introduction to the major. Instead, greater emphasis is placed on core skills that enable students to approach a subject, or a problem, from the perspective of an expert in the discipline.”

–from “Reforming Gen Ed: strategies for success on your campus,” Beth McMurtrie, pg. 13
The Chronicle of Higher Education



New Advising Model: Research Brief

From “[The New Generation of Students](#),” by Jeff Selingo, published by *The Chronicle of Higher Education*, 2018:

“...more than half of today’s students say they prefer to receive coaching in person, in one-on-one sessions, according to a survey conducted by the Center for Generational Kinetics along with Civitas Learning,” (pg. 31).

From “[The Effects of Student Coaching in College: An Evaluation of a Randomized Experiment in Student Mentoring](#)” by Dr. Eric P. Bettinger and Rachel Baker Stanford University School of Education:

- Students who were randomly assigned to a coach were more likely to persist during the treatment period, and were more likely to be attending the university one year after the coaching had ended.
- Coaching proved a more cost-effective method of achieving retention and completion gains when compared to previously studied interventions.

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Gen Ed & Capstone Redesign: Research Brief

From “Trends and Emerging Practices in General Education,” Based On A Survey Among Members Of The Association Of American Colleges and Universities, conducted by Hart Research Associates, May 2009:

“Real-world experiences... prove to be critical once students enter the workplace. In the 2007 business leaders survey, 69% said that they think that completion of a supervised and evaluated internship or community-based project that requires students to apply their college learning in real-world settings would be very effective in ensuring that recent college graduates possess the skills and knowledge needed for success... faculty-evaluated internships or community-based learning experiences ranked highest among a list of potential practices that business leaders would recommend for colleges and universities to develop...” (pg. 10-11).

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GROUP 3: Enrollment Drivers

Group 3 initiatives (Initiative 3: **Tracks Centers**; Initiative 6: **Adult Learning**; Initiative 10: **CSU-Pueblo Professional**) target specific student markets: incoming freshmen from the region, adults without a college degree, and new graduate students. This group includes:

- 1) 2 New Tracks Centers; 1 New Coordinator
- 2) Faculty and Peer Mentors at Tracks Centers
- 3) Tracks Centers Director
- 4) Prior Learning Assessment Programming
- 5) Campus Phone System and After Hours Support
- 6) Faculty Time & Effort
- 7) Instructional Designer and Open Education Resource Implementation
- 8) Graduate Support Staff: Processor, Enrollment Coordinator

TOTAL 2-YEAR INVESTMENT, FY20 & FY 21 = \$1,498,609

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“For colleges moving into a new market, especially one that is far away, turning their campuses into a place that is familiar to students is a multi-year process. It requires staff on the ground who spend time getting to know counselors, visiting high schools, and managing career fairs. Persuading the first student to apply and eventually enroll is key to encouraging others to follow.”

–from “The Future of Enrollment,” Jeff Selingo, pg. 24
The Chronicle of Higher Education



University Tracks Centers: Research Brief

From “[The Future of Enrollment](#),” by Jeff Selingo, published by *The Chronicle of Higher Education*, 2017:

“The biggest growth in high-school graduates in the next decade will be among first-generation, low-income, and Hispanic students – all groups who tend to have lower test scores and high school grades, and are unable or unwilling to travel far-distances to college,” and

“Sixty years ago, students lacked adequate information about going to college; now they may have too much, causing confusion among families without experience in sorting out their college choices,” (pg. 9).

According to [Pew Research Center](#), fewer Americans are changing residences than any other time in the past 60 years.

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Adult Learning: Research Brief

From “The Four Reasons Your Campus Should be Offering Prior Learning Assessment Credit,” by Matt Bergman, Ph.D., <https://evollution.com>, July 12, 2019:

“There are over 36 million adults with some college and no degree. Couple that with a declining population of high school graduates over the next 20 years and you have a recipe for innovative approaches to fuel the enrollment goals of America’s colleges and universities of the future. The relevance of adult learners to the viability of many institutions is becoming increasingly evident. This fierce competition for student tuition dollars is poised to breed new economic realities that also influence academic programs. Consequently, Prior Learning Assessment (PLA) has the potential to re-engage a dormant student population waiting for an opportunity to finish a long-held goal started last year or long ago.”

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CSU-Pueblo Professional: Research Brief

Data from “[Graduate Enrollment and Degrees: 2007 to 2017](#),” by Hironao Okahana and Enyu Zhou, published by *Council of Graduate Schools*, October 2018:

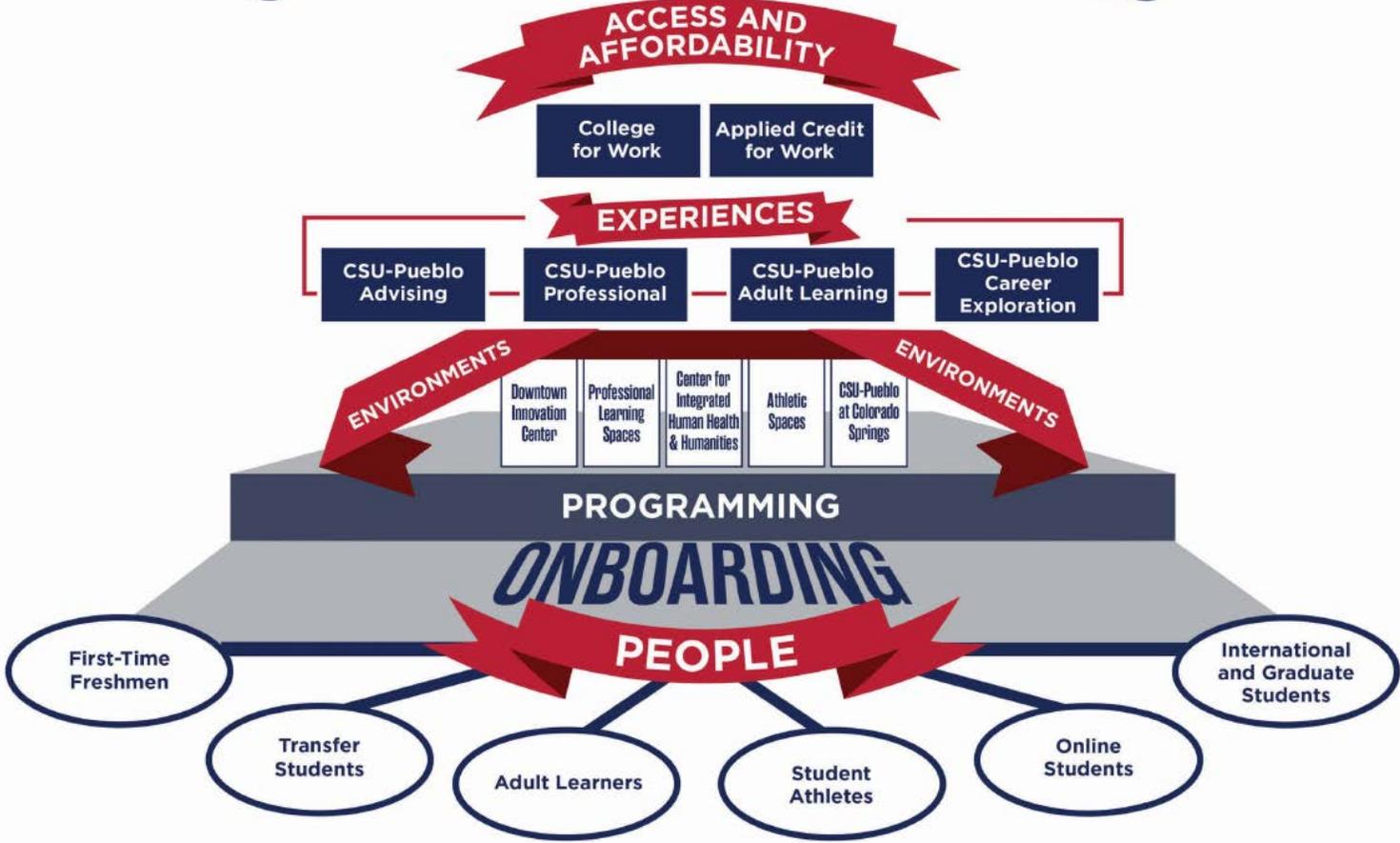
“Particularly notable among underrepresented minorities was that for two consecutive years, first-time graduate enrollment of Hispanic/Latino students increased (5.6%). The five-year average annual rate of change (8.0%), as well as the ten-year average annual rate of change (8.1%), is strong... Both Hispanic/Latino men and women saw an increase in first-time graduate enrollment (7.9% and 4.2%, respectively) between Fall 2016 and Fall 2017,” (pg. 4).

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CSU-PUEBLO WORKS



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Vision Phase 1: BUDGET	FY20-21	FY22	FY23	FY24	FY25
Initiative 1: Financial Aid Model	\$570,267	\$557,667	\$993,437	\$633,320	\$137,320
5 YEAR PROJECT TOTAL					\$2,892,011
Initiative 2: Athletics	\$1,989,294	\$69,756	\$71,249	\$72,786	\$74,370
5 YEAR PROJECT TOTAL					\$2,277,455
Initiative 3: Tracks Centers	\$523,809	\$523,586	\$626,406	\$732,442	\$703,690
5 YEAR PROJECT TOTAL					\$3,109,933
Initiative 4: New Advising Model	\$1,541,600	\$1,395,229	\$1,421,929	\$1,449,436	\$1,447,753
5 YEAR PROJECT TOTAL					\$7,255,947
Initiative 6: Adult Learning	\$586,200	\$1,400,765	\$715,788	\$931,262	\$647,200
5 YEAR PROJECT TOTAL					\$4,281,215
Initiative 7: GenEd/Capstone Redesign	\$614,900	\$1,256,089	\$1,420,096	\$1,461,199	\$1,503,534
5 YEAR PROJECT TOTAL					\$6,255,818
Initiative 10: CSU-Pueblo Professional	\$388,600	\$718,000	\$610,000	\$658,000	\$525,000
5 YEAR PROJECT TOTAL					\$2,899,600
PROJECT MANAGEMENT	\$1,579,103	\$827,053	\$848,376	\$892,964	\$986,000
5 YEAR PROJECT TOTAL					\$5,133,496
VISION 2028, ANNUAL GRAND TOTALS	\$7,793,773	\$6,748,145	\$6,707,281	\$6,831,409	\$6,024,867
VISION 2028, 5 YEAR PROJECT TOTAL					\$34,105,475
5 YEAR SYSTEM INVESTMENT					\$34,105,475

WHAT ARE THE UNIVERSITY GOALS FOR FY20?

WIG 1: Increase Enrollment

WIG 2: Increase Student Success

WIG 3: Increase Employee Satisfaction

IMPLEMENT PHASE 1 OF VISION 2028



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

*See May 2019 Board Documents, "Appendix" for additional research, supporting documentation, detailed budgets, and accompanying recommended budget narrative for each initiative.



Project Management Plan for FY20 through FY29*

INITIATIVE	LEADING INDICATOR	FY20 REQUEST	FY21 REQUEST	LAGGING INDICATORS		FY21	FY22	FY23	FY24	FY25	FY26	FY27	FY28	FY29	NEW TOTALS
						NEW ENROLLMENT GROWTH									
1	Project Management	\$ 768,300.00	\$ 810,803.00	WIG 1 /WIG 3											
	Financial Aid			WIG 1 /WIG 2											
2		\$ 282,600.00	\$ 287,667.00												
3	Athletics	\$ 1,927,259.00	\$ 62,035.00	WIG 1 /WIG 2											
	Univ. Tracks Centers			WIG 1											
4		\$ 194,100.00	\$ 329,709.00												
5	Advising	\$ 534,100.00	\$ 1,007,500.00	WIG 1 /WIG 2 / WIG 3											
	CSU-Pueblo at COS			WIG 1 /WIG 2		25	50	75	100	100	150	200	250	250	1200
6		\$ -	\$ -	WIG 1 /WIG 2											
7	Adult Learning	\$ 390,600.00	\$ 195,600.00	WIG 1 /WIG 2											
	Gen Ed & Capstone			WIG 1 /WIG 2 / WIG 3											
8		\$ 223,700.00	\$ 391,200.00	WIG 1 /WIG 2 / WIG 3											
	Downtown Presence			WIG 1 /WIG 3											
9		\$ -	\$ -	WIG 1 /WIG 2 / WIG 3											
	Professional Learning Spaces			WIG 1 /WIG 2 / WIG 3											
10		\$ -	\$ -	WIG 1 /WIG 2 / WIG 3											
	CSU-Pueblo Professional	\$ 194,300.00	\$ 194,300.00	WIG 1 /WIG 2 / WIG 3											
		TOTAL INVESTMENT \$7,793,773		HEADCOUNT	3,857	3,882	3,932	4,007	4,107	4,207	4,357	4,557	4,807	5,057	5,057
Incremental Annual Impact TOTALS					REVENUE	\$ 239,875	\$ 479,750	\$ 719,625	\$ 959,500	\$ 959,500	\$ 1,439,250	\$ 1,919,000	\$ 2,398,750	\$ 2,398,750	\$ 11,514,000
					-25% to Fin Aid	\$ 59,969	\$ 119,938	\$ 179,906	\$ 239,875	\$ 239,875	\$ 359,813	\$ 479,750	\$ 599,688	\$ 599,688	\$ 2,878,500
					-Indirect Costs	\$ 53,972	\$ 107,944	\$ 161,916	\$ 215,888	\$ 215,888	\$ 323,831	\$ 431,775	\$ 539,719	\$ 539,719	\$ 2,590,650
					NET REVENUE	\$ 125,934	\$ 251,869	\$ 377,803	\$ 503,738	\$ 503,738	\$ 755,606	\$ 1,007,475	\$ 1,259,344	\$ 1,259,344	\$ 6,044,850

*Assumptions and Variables:

- Total Enrollment Growth of 29% over 9 Fiscal Years
- State Support Remains Steady
- Tuition Remains Flat (eg: no increase and steady discounted rates)
- Retention Remains Steady at 70% After FY 21
- Retention Impact of 84% of Total New Enrollment FY21-FY23 (n=21, 42, and 63)
- At FY24 Retention Impact at 63%, FY 26 42%, FY27 31%, and 25% at FY 28 and FY29 (n= 63 FY23-FY29)

Project Management Plan for FY20 through FY29*

			FY21	FY22	FY23	FY24	FY25	FY26	FY27	FY28	FY29	
CUMULATIVE REVENUE GENERATED BY FY29 \$40,299,000		New Annual Revenue	\$ 239,875	\$ 719,625	\$ 1,439,250	\$ 2,398,750	\$ 3,358,250	\$ 4,797,500	\$ 6,716,500	\$ 9,115,250	\$ 11,514,000	
		-25% to Fin Aid	\$ 59,969	\$ 359,813	\$ 599,688	\$ 839,563	\$ 1,199,375	\$ 1,679,125	\$ 2,278,813	\$ 2,878,500	\$ 2,878,500	
		-Indirect Costs	\$ 53,972	\$ 107,944	\$ 251,869	\$ 467,756	\$ 647,663	\$ 935,513	\$ 1,331,306	\$ 1,871,025	\$ 2,590,650	
		Vision 2028 Contribution	\$ 125,934	\$ 251,869	\$ 587,694	\$ 1,091,431	\$ 1,511,213	\$ 2,182,863	\$ 3,106,381	\$ 4,365,725	\$ 6,044,850	
		Cumulative Revenue	\$ 239,875	\$ 959,500	\$ 2,398,750	\$ 4,797,500	\$ 8,155,750	\$ 12,953,250	\$ 19,669,750	\$ 28,785,000	\$ 40,299,000	



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THANK YOU

