

SELF-STUDY

Prepared for the Mercyhurst Community and
the Middle States Commission on
Higher Education

February 2022



MERCYHURST
UNIVERSITY

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List of Acronyms at Mercyhurst University

| | |
|-------|--|
| ADA | Americans with Disabilities Act |
| AIM | Autism Initiative at Mercyhurst |
| APAC | Academic Planning and Assessment Committee |
| BTG | Beyond the Gates |
| CDC | Career Development Center |
| CIC | Campus Involvement Center |
| CLE | Credit for Life Experience |
| CMHE | Conference on Mercy Higher Education |
| CRM | Customer Relationship Management |
| CTE | Center for Teaching Excellence |
| DIT | Diversity and Inclusion Taskforce |
| ELIES | Evelyn Lincoln Institute for Ethics and Society |
| FDC | Faculty Development Committee |
| FSAT | Faculty-Student Academic Travel |
| HEERF | Higher Education Emergency Relief Fund |
| HR | Human Resources |
| IT | Information Technology |
| LDP | Leadership Development Program |
| MAC | Multicultural Activities Council |
| MFA | Multifactor Authentication |
| MIAC | Mercyhurst Institute for Arts & Culture |
| MSCHE | Middle States Commission on Higher Education |
| MSG | Mercyhurst Student Government |
| NCAA | National Collegiate Athletic Association |
| OAA | Office of Academic Affairs |
| OAS | Office of Academic Services and Support |
| OCICU | Online Consortium of Independent Colleges and Universities |
| ODL | Office of Distance Learning |
| OIE | Office of Institutional Effectiveness |
| PAF | Personnel Action Form |
| RSCO | Recognized Student Clubs and Organizations |
| SAC | Student Activities Council |
| SFS | Student Financial Services |
| SOC | Student Outreach Committee |

Chapter 1: Executive Summary

This Self-Study Report serves the pragmatic purpose of demonstrating the University's compliance with the Middle States Commission on Higher Education (MSCHE) Requirements of Affiliation and Standards of Accreditation. Through that process we have identified areas of strength and also opportunities for innovation and improvement, many of which we have already started to address. However, the self-study has done something even more important, which is what all good and deliberate assessment processes do: it has provided the University with an opportunity for critical reflection which in turn has led to findings that will push the institution forward and guide improvement efforts in the years to come.

Mission and Goals

The University's commitment to the mission, core values, and Mercy heritage is clear. Mercyhurst's mission and liberal arts tradition come together to create opportunities for a truly transformative education experience, as evidenced through initiatives like outREACH and the ongoing efforts toward supporting diversity, equity, inclusion, and justice. As we move forward, Mercyhurst will continue to be guided by the mission in decision making, but with an increased awareness of the importance of operationalizing and documenting those impacts, specifically as they relate to resource allocation.

Ethics and Integrity

In the spirit of our core values, Mercyhurst is committed to upholding the dignity of work through ethical practices, transparent interactions, and the promotion of a culture of care and concern for all members of the university community. As we move forward, Mercyhurst will continue to ensure sustainable human resource practices including a mission-grounded performance review process for all employees and the ongoing review of policies, practices, and procedures relating to ethics and integrity, both formally and informally.

Design and Delivery of the Student Learning Experience

Mercyhurst University continues to demonstrate the foremost importance of learning and education through meaningful student experiences, such as REACH liberal arts curriculum and the mission-centered outREACH experience, global learning opportunities, educational support systems, and the commitment to teaching as the core of the Mercy Mission. As we move forward, Mercyhurst will continue to emphasize programs that integrate the liberal arts with applied fields of study in preparing students for meaningful careers and lives beyond our gates and continue efforts to support the research scholarship of both faculty and students.

Support of the Student Experience

From matriculation through graduation, the University demonstrates a respect and appreciation for the total student experience and strives to ensure that all students understand what it means to be a "Laker for Life." As we move forward, Mercyhurst will build on progress made in educational effectiveness to understand the value of assessing learning and other outcomes more deeply in the student services areas.

Educational Effectiveness Assessment

Mercyhurst University has made significant progress in the area of educational effectiveness assessment since the last decennial review, and those efforts have manifested a culture of engagement in assessment at the

individual, course, program, and university levels. Notably, efforts toward assessing the outREACH program have provided the university with learning outcomes data tied directly to mission that cannot be matched by many institutions. As we move forward, Mercyhurst will continue this positive trajectory as we refine efforts to gain meaningful assessment of the REACH curriculum as a whole and more clearly document how educational effectiveness assessment is linked to resource and budget allocation.

Planning, Resources, and Institutional Improvement

The University administration serves as thoughtful stewards of the institution's resources. The new administration has begun the work of budgeting and resource allocation in earnest, with a renewed emphasis on thoughtful and modest budget assumptions, information-rich decision making, and alignment of planning to the mission and core values. As we move forward, Mercyhurst will focus on necessary steps such as continuing to address deferred maintenance and debt service to ensure financial sustainability, as well as developing explicit and transparent means for linking the mission and strategic priorities to resource allocation and communicating with the broader university community.

Governance, Leadership, and Administration

The governing body of Mercyhurst University serves as committed leaders, functioning to ensure integrity in all operations and with a commitment to shared governance. As we move forward, the president and cabinet will continue to build a culture of transparent and informed decision making, ensure the appropriateness of the organizational structure, and emphasize the value of communication with the university community.

Chapter 2: Introduction

Overview

Mercyhurst University is an accredited, not-for-profit, four-year, Catholic liberal arts institution. Originally founded as Mercyhurst College by the Sisters of Mercy in 1926, the University was chartered in 1928, enrolled its first coeducational class in 1969, opened its first graduate program in 1978, and is now considered a *Master's College & University: Medium Program* by the Carnegie Classification system.

The Religious Sisters of Mercy were founded by Mother Catherine McAuley in Dublin, Ireland. In addition to the three vows common to all organizations of religious women, the Sisters of Mercy take a fourth vow of service to those who are poor, sick, and uneducated; this commitment to service has always been central to the mission and values of Mercyhurst University. A Mercyhurst education engages students for life and creates leaders in justice and service.

Mercyhurst University is located in Erie, Pennsylvania, overlooking Lake Erie. The University enjoys the advantages of a suburban setting only minutes from the downtown area of the City of Erie. Erie, located in northwestern Pennsylvania, is the largest city in that part of the Commonwealth and is the fourth largest city overall in Pennsylvania. Erie is approximately equidistant (two hours driving time or less) from the cities of Pittsburgh, Pennsylvania; Cleveland, Ohio; and Buffalo, New York. Mercyhurst University currently operates two additional locations in urban Erie and in rural Corry, Pennsylvania. Mercyhurst Dungarvan in Ireland serves as an instructional site. In addition, a branch campus in North East, Pennsylvania, housed the University's associate degree programs from 1991 until 2021; as that campus closed, those programs were moved to the main campus.

Academics

Consistent with the tradition of the institution, Mercyhurst University provides each student with an education grounded in the liberal arts. Along with this foundation in the liberal arts, the university offers signature academic programs that enable students to develop competitive job skills in high demand areas. The following sections describe the academic offerings at the institution.

REACH Liberal Arts Curriculum

The current iteration of the general education curriculum, REACH, provides students with a broad-based education that is grounded in the Mercy mission. The courses in this experience are designed to challenge mindsets and assumptions, enable the development of critical thinking and problem-solving skills, encourage curiosity and creative inquiry, cultivate an appreciation of arts and culture, ignite community awareness and engagement, and help instill in the students a resilience in the face of challenges. The REACH curriculum is comprised of the following parts.

The Freshman Experience - An introduction to academic writing and thought, as well as to college life. This experience requires the foundational research/writing/composition course, as well as two one-credit courses to help ease the transition from high school to college and introduce students to the mission and values of the institution.

The Liberal Arts Experience – A series of ten courses in ten different disciplines across five different themes. This experience provides students with the opportunity to ensure a breadth of knowledge across the liberal arts while also ensuring flexibility for productive degree pathways.

The Senior Experience – A true capstone experience consisting of one shared ethics capstone course for all students at the institution plus a designated course or equivalent experience within the major programs.

outREACH – a credit-based service experience that engages students meaningfully with *others*; students then complete a series of guided reflections that urge our graduates to uphold the Mercy Mission throughout their lives.

Academic Programming

The university furnishes students with the knowledge and skills necessary for lasting success in a career and for making meaningful contributions to society. In addition to a variety of undergraduate programs, the university offers graduate programs leading to a Master of Science degree in the Administration of Justice, Special Education, Secondary Education, Organizational Leadership, Physician's Assistant Studies, Applied Forensic Sciences, Applied Intelligence, Cyber Risk Management, Cyber Security, and Data Science. Academic departments are organized into four colleges, each overseen by a dean and associate dean who report to the Vice President for Academic Affairs.

Academic Accreditations

The university is accredited by the Middle States Commission on Higher Education (MSCHE), last reaffirmed in 2014. Mercyhurst participated in the Mid-Point Peer Review Process in 2018, where the Commission acted as follows:

To note that the Mid-Point Peer Review has been conducted. To request that the next self-study, in preparation for a visit in 2021-2022, provide further evidence of (1) improvement of key indicators of student success, including retention and graduation rates (Standard IV); (2) clearly stated policies, processes and programs to admit, retain and facilitate the success of all students (Standard IV); and (3) improved financial viability and sustainability with evidence of sufficient resources to improve student achievement measures. (Standard VI and Requirement of Affiliation 11)

Additionally, the university has specific programs that are accredited by a number of organizations. Along with the degrees that the university is authorized to offer under its charter, the university is authorized to offer programs leading to teacher certification from the Commonwealth of Pennsylvania in several areas.

Significant changes and challenges since the last self-study

Leadership

Since the last MSCHE accreditation process that was finalized in 2014, Mercyhurst University has had some significant changes in leadership. The first of two new administrations was installed in August 2015. That administration prioritized robust planning, analysis, and financial forecasting and focused on professionalism, accountability, data-driven decision making, transparency, shared governance, and a rededication to the Mercy mission. In February 2021, the university's president retired. The sitting chair of the university's Board of

Trustees stepped down from his position to assume the role of interim president until a presidential search process could be completed. In July 2021, Mercyhurst welcomed a new president.

Strategic planning

Beginning with the prior administration, Mercyhurst implemented significant changes in its approach to strategic planning. In 2017, the university began the process for a new plan, entitled “Renewal Through the Mercy Mission,” to take effect from 2018-2020. This plan reflected efforts to rededicate the university community to the Mercy mission and placed special emphasis on envisioning a new future for the North East campus, as evidenced by the plan’s four goals. The process included input from all constituencies through focus group meetings and events. The Board of Trustees voted to extend this plan to 2021.

While the current plan, entitled “Mission Inspired., Future Ready. 2021-2024,” was developed through a comprehensive evaluation of the Mercyhurst mission and core values. The plan serves as a guide for making key institutional decisions and allocating resources, with metrics to determine progress that are shared with key stakeholders.

Under the leadership of the new president, a strategic plan review and revision process is currently underway that builds on the work of the 2021-2024 plan. Four broad goals have been established: Student Experience, Organizational Culture, External Engagement, and Institutional Vitality. These goals reflect the results of formal and informal assessments of the university’s current needs and opportunities. Each goal will comprise multiple initiatives and action steps. During February and March, key constituents have been invited to review and comment on the plan. An operational plan will be developed in April that includes clear metrics, resource needs and sources of funds to support each goal, and responsible parties for each action step. This plan will be presented to the Board of Trustees for approval in May.

Curricular change

The prior administration dramatically changed the approach to the general education curriculum while at the same time altering the academic calendar and the academic organizational structure. For the first time, the focus of the general education curriculum was decoupled from departments and courses and tied firmly to the principles inherent in the triad of Mercy, Mission, and Academic Excellence. The Mercy and Mission components are supported by three course experiences: the first is designed to acclimate students in their first year; the second is to be completed by the end of the second year; and the third experience caps the senior year. The second component, the **Beyond The Gates (BTG)** requirement, especially embeds Mercy and mission activity and urges personal reflection. The Academic Excellence component is addressed through the ten-course-requirement of the liberal arts in program areas represented by the acronym **REACH**, which stands for **R**eason & **F**aith, **E**xpression & **C**reativity, **A**nalytical Thought, **C**ontexts & **S**ystems, and **H**umans in Connection. Deeply interdisciplinary, REACH provides students with diverse perspectives and multiple critical tools for life, service, and work. All three components of the curriculum work together for student engagement and personal growth.

Campus consolidation

Mercyhurst University is committed to educating students in the Mercy tradition. To that end, the North East campus was founded in 1991 as an “opportunity and career college.” Dedicated to providing post-secondary education for capable learners who sought to learn job-entry skills, Mercyhurst North East was essentially a

community college in the Mercy tradition. Its purpose was to provide an accessible and affordable education to students and prepare them to successfully manage future academic, career, and life challenges. While the programs offered at the North East campus have varied, most of the programs were in allied health disciplines and other health professions. These programs, such as physical therapist assistant, respiratory therapy, and both LPN and RN nursing programs, along with other programs in business, criminal justice, and hospitality management, remain strong and valuable programs for our students. Moreover, Mercyhurst University is committed to offering the strong allied health and career and technical education programs well into the future.

However, in the nearly three decades that has passed since the founding of Mercyhurst North East, the needs and demographics of students in the region have changed. In fact, the change has been so significant that the original goal of the North East campus – to provide accessible and affordable education to students – is no longer best met by having certificate and associate degree programs housed in a separate location. After deep consideration and analysis, the decision was made to consolidate the associate degree programs to the Erie campus and no longer use the North East branch campus location. The senior leadership team at Mercyhurst University spent two years monitoring the status of the North East campus, including enrollment, student outcomes, and finances. The Board of Trustees of Mercyhurst University carefully reviewed data and considered potential pathways forward to ensure the success of the university as a whole, while still fulfilling the mission-driven goals that originally motivated the creation of the North East campus. The Board of Trustees made the decision that closing the North East campus was the most favorable means to continue educating students in the Mercy tradition and to ensure that the university prospers well into the future. As such, Mercyhurst University submitted a Substantive Change for Closure of a Branch Campus in the fall of 2019. That action was approved by the Commission at their January 2020 meeting, and the university's efforts toward a smooth consolidation have swiftly followed. The campus was recently sold to an entity with plans to be good stewards of the property.

Assessment

Since the last MSCHE accreditation process in 2014, Mercyhurst University has undertaken a studied change in its approach to assessment. A lack of commitment to assessment principles and practices lead Mercyhurst to be placed on warning by the Commission; while this outcome was regrettable, it provided the impetus the institution needed to embrace assessment as a necessary and vital component of academic excellence. First efforts at committing to assessment of student learning were overly ambitious and unsustainable. In the years since, an Office of Institutional Effectiveness (OIE) was created to work with departments to ensure that assessment plans are manageable in scope, that the methods used to assess are aligned with the goals to be achieved, and the university can affirm that they work.

The Self Study Process

Institutional Priorities

In effect from 2020 to 2023, the university's latest strategic plan is entitled "Mission Inspired. Future Ready." As part of this plan's process, the steering committee for the strategic plan conducted focus group discussions with various constituencies of the university, including faculty and staff, students, and alumni. These discussions directed participants' attention to answering the same broad questions the steering committee had posed to

itself: (1) considering internal and external factors, what affects our ability to fulfill our Mission?; (2) considering the present situation of the university, where would we say we are now in relation to internal and external opportunities and disruptors?; (3) considering the future to the extent we can forecast it, where do we want to go? These questions spawned sub-questions and answers, allowing for discovery of the big picture concerns as well as fine details of constituents' experiences of and visions for the university. Steering committee and focus group responses were produced independently of each other to attempt to discover mandated priorities for the next three years. After all focus groups had met, the chair of the steering committee collated responses and presented those to the steering committee. Themes were created and reflected in the plan's naming process. Though the final grouping and wording was constructed by the steering committee, the elements were the direct result of the focus group discussion.

Through engaging in self-appraisal in this integrated and meaningful way during both the Self-Study and Strategic Plan processes, Mercyhurst University has identified the following institutional priorities:

- Engage and invest in academic program development that provides flexible degree pathways and diverse offerings for graduate and professional programs as well as programs in allied health and related disciplines, while maintaining the core liberal arts values of the institution.
- Enhance the effectiveness of our co-curricular programs, in line with the changing needs of the student population, and with special attention to the areas of mental health and non-traditional student services.
- Ensure a strong foundation for the university by focusing on building financial security, stabilizing and augmenting the physical and human resources, and actively engaging with the Sisters of Mercy as we prepare to enter our second century.

The priorities are aligned with our Mission in the following ways:

• **Table 1 Alignment of Mission and Institutional Priorities**

| Mission Statement Elements | Priority #1: Engage and invest in academic program development that provides flexible degree pathways and diverse offerings for graduate and professional programs as well as programs in allied health and related disciplines, while maintaining the core liberal arts values of the institution. | Priority #2: Enhance the effectiveness of our co-curricular programs, in line with the changing needs of the student population, and with special attention to the areas of mental health and non-traditional student services. | Priority #3: Ensure a strong foundation for the university by focusing on building financial security, stabilizing and augmenting the physical and human resources, and actively engaging with the Sisters of Mercy as we prepare to enter our second century. |
|---------------------------------------|--|--|---|
| Mercy Heritage | X | X | X |
| Beauty & power of Liberal Arts | X | | |
| Dignity of work | X | X | X |
| Serving others; leadership in service | | X | X |
| Student-faculty bonds | X | | |
| Human and spiritual values | X | X | X |

Intended Outcomes of the Self-Study

As part of the effort to engage the campus community early and often in the self-study process, the steering committee provided all faculty, staff, and students with the opportunity to contribute ideas for the intended outcomes of the self-study. After broad participation across campus, themes were extracted to create a set of intended outcomes that address the issues put forward by community members.

By engaging in this self-study process, Mercyhurst intends to:

- demonstrate how Mercyhurst University currently meets the Commission's Standards for Accreditation and Requirements of Affiliation;
- focus on continuous assessment and improvement of institutional policies and procedures to better achieve the Mercyhurst Mission and address institutional priorities;
- engage in an inclusive and transparent self-appraisal process that actively and deliberately seeks to involve all campus constituencies and institutional stakeholders;
- identify current and possible future practices of support of the student experience for all students in order to develop more effective, equitable, and sustainable programs, particularly in preparation for consolidation of the North East and Erie campus communities; and

- explore ways in which the Mercyhurst community can actively and authentically engage the Mercyhurst Mission, especially as it intersects with the core values of being Socially Merciful, Globally Responsible, Compassionately Hospitable, Intellectually Creative, and Reflectively Aware Ambassadors of Service.

These intended outcomes express the relationship between our stated mission and our daily practices in all units of the university. Mercyhurst University intends to forge even deeper connections between our past and future so that we may authentically enact the message of our latest strategic plan, *“Mission Inspired. Future Ready. 2021-2024.”* and use the entire self-study process as a point of critical analysis, a guided approach to self-reflection, and an opportunity to chart a course forward.

Self-Study Approach

Mercyhurst University elected to follow a standards-based approach for the self-study. This decision was motivated by several factors, including the fact that Mercyhurst was coming to the end of one Strategic Plan (“Renewal Through the Mercy Mission,” 2018-20) and beginning the process of another. A standards-based approach permitted us to begin the work of the self-study analysis immediately and form/charge the working groups even before strategic planning level institutional priorities had been clearly delineated for the 2020-23 strategic plan.

Organizational Structure of the Steering Committee and Working Groups

In anticipation of the self-study process and, Mercyhurst University’s administration, in consultation with OIE, selected a chair of the MSCHE Self-Study Steering Committee. To better prepare for the process, the chair of the steering committee and the assessment coordinator attended the October 2019 MSCHE Self-Study Institute. Shortly thereafter, the president and the cabinet finalized the steering committee membership and charged them with overseeing the MSCHE self-study process.

Criteria for members of the steering committee were based on the following:

- Individuals who are familiar with the mission, core values, and goals of Mercyhurst;
- Individuals who have a sense of commitment to the self-study process and to the institutional priorities of Mercyhurst;
- Individuals who have the capacity for a broad institutional perspective that transcends their own niche areas;
- Individuals who represent various institutional constituencies;
- Individuals who bring various and necessary areas of expertise to the self-study process.

Applying those criteria, the following individuals were asked, and agreed, to serve on the steering committee:

Table 2 Steering Committee Membership

| Participant Name and Role | Title |
|-----------------------------------|---|
| Dr. Joanne Hosey-McGurk, Co-Chair | VPAA, Assistant Professor of English |
| Dr. Dyan Jones, Co-Chair | Assoc. VP for Institutional Effectiveness, Dean of Zurn College, Associate Professor of Physics |
| Dr. Carrie Allen | Assessment Coordinator |
| Mr. Nicholas Brodfuehrer, '22 | Mercyhurst Student Government President |
| Mr. Michael Heller | Vice President for Finance and Administration |
| Dr. Jim Snyder | Associate Professor of Philosophy |
| Dr. Laura Zirkle | Vice President for Student Life |

The same criteria and a standards-based approach were used to create the working groups, representing seven areas of standards and compliance. The steering committee members created the chair positions for each working group as well as all its members.

The chairs of each working group had an initial face-to-face meeting with the steering committee. During these meetings, chairs were provided with a set of resources relevant to their working groups. Also, each working group received a charge that described their task specifically as well as a set of common concerns to bear in mind.

As communication between working groups and the steering committee was of paramount importance, Microsoft Teams was used for communication within working groups themselves and between all working groups and the steering committee.

Further, each employee member of the steering committee agreed to serve as the liaison for two of the working groups. The liaison served as a direct conduit to and from the working group and the steering committee, though working group chairs could contact the steering committee chair or other members relevant to their question or concern directly, as well.

Organization of the Self Study

The Self-Study Report is organized by chapter. Initial chapters provide an overview of the process and institution. Subsequent chapters are organized by Standard, with each Standard-focused chapter containing an overview, summary of findings, analysis, improvements, and innovations.

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Chapter 3: Standard I – Mission and Goals

The institution's mission defines its purpose within the context of higher education, the students it serves, and what it intends to accomplish. The institution's stated goals are clearly linked to its mission and specify how the institution fulfills its mission.

Overview

Mercyhurst University meets the requirements of Standard I. A full description of the ways Mercyhurst University meets the four criteria and all applicable sub-criteria of Standard I, as well as the *Requirements of Affiliation 7, 10, and 12*, are presented throughout this chapter.

The university has a clearly articulated mission and core values that exhibit a vibrant presence in the life of the campus, reflect clearly its Sisters of Mercy tradition and Catholic liberal arts identity, ground the actions and decisions of university leadership and governance, function as critical touchstones in planning and assessment, guide program development and implementation to enhance and ensure the student experience, and support an environment that embraces tolerance, diversity, community, and well-being.

Placing Mission at the Center

Explicit and unequivocal, the Mercyhurst University Mission, Vision, and Core Values Statements articulate the commitment the university makes to the student experience as central to its identity, in line with *Requirement of Affiliation 7* (S1.C1: Mission, Vision, and Core Values).

Mission Statement

Consistent with its Catholic identity and Mercy heritage, Mercyhurst University educates diverse persons in a culture where faith and reason flourish together, where the beauty and power of the liberal arts combine with an appreciation for the dignity of work and a commitment to serving others. Confident in the strength of its student-faculty bonds, the university community is inspired by the image of students whose choices, in life and work, will enable them to realize the human and spiritual values embedded in everyday realities and to exercise leadership in service toward a just world.

Vision Statement

Mercyhurst University seeks to be a leading higher educational institution that integrates excellence in the liberal arts, professional and career-path programs, and service to regional and world communities.

Core Values

Through its Core Values Statement, the university articulates the values and viewpoints that set Mercyhurst apart as a provider of higher education in the 21st century marketplace. The university's core values frame the application of its mission in response to external constituencies and contexts and connects its values to both the external world and the internal world of the individual. The first two core values, *Socially Merciful* and *Globally Responsible*, describe the dispositions of Mercyhurst University towards various peoples, challenging social conditions, and the conditions of the earth itself. The last two core values, *Intellectually Creative* and *Reflectively Aware*, point to the internal world of the student. These values invite students to sharpen their intellectual

capacities while maintaining creativity and critical self-awareness. The middle core value, *Compassionately Hospitable*, is the nexus binding self to other, beginning with self-acceptance and extending beyond to encountering and welcoming otherness in various forms. The final overarching value, *Ambassadors of Service*, provides the critical intersection, resonating with the mission commitment to serving others and dedicated to Mercy as concerted action for the common good.

Promoting Mission Identity and Integrity

The value the university places on its mission and core values is strongly evidenced by the consistent presence of both as foundational elements in all critical university documents, as well as key internal and external publications both in print and online. Further, they are indisputably present in all aspects of how Mercyhurst University expresses its identity and binds its internal constituencies, which includes students, faculty, staff and trustees, and its external constituencies, particularly alumni and the regional community that surrounds and supports the university (S1.C1: Mission, Vision, and Core Values).

The mission and core values are rooted firmly in the Sisters of Mercy tradition and Catholic Liberal Arts commitment. While there are many examples of the identity connection, the university's affiliation with the Conference on Mercy Higher Education (CMHE) is a particularly strong illustration of an ongoing commitment to living its Mercy and Catholic identity. As one of seventeen colleges and universities affiliated with the Sisters of Mercy, Mercyhurst University maintains all necessary components of its covenantal agreement and strong lines of communication with CMHE. The president, vice president for academic affairs, and vice president for mission participate in regular meetings with CMHE leadership and their peers from other Mercy-affiliated colleges and universities. The university completed its decennial self-study and peer review process through CMHE in October 2020 (S1.C1: CMHE 2020 Self-Study).

The mission and core values are explicitly present in the day-to-day experiences of the university. As detailed below, the mission and core values provide not just the spirit but also the narrative force behind institutional strategic planning as evidenced through the previous strategic plan "Renewal Through the Mercy Mission: 2018-2021" and the current strategic plan "Mission Inspired. Future Ready. 2021-2024," in line with *Requirement of Affiliation 10* (S1.C1: 2018-2021 Strategic Plan; S1.C1: 2021-2024 Strategic Plan). Detailed later in this chapter, many of these are high-profile and operations-critical, such as requiring new members of the Board of Trustees to serve on the board's mission sub-committee in their first year, having the vice president for mission serve at cabinet level, grounding the REACH core curriculum and outREACH initiatives in mission, tying all departmental assessment processes and plans to specific and explicit mission relevance, and the inclusion of a mission-centered metric in the university-wide performance evaluation. Other examples speak to the presence of mission and core values as essential elements in the shared identity and enterprise that bind the members of the Mercyhurst community together. Still other examples include critical investments in mission identity through formation of programs such as the Mercy Emissaries program or the Mercyhurst Ambassadors (S1.C1: Mercy Emissary Overview). Rounding out these larger scale mission initiatives are many simple but vital events and communication portals that support and transmit mission understanding and commitment (S1.C1: Mercy Communications Summary).

Linking Mission to Planning

As detailed in the university's previous MSCHE self-study, the current mission and core values were established and approved in 2007 after a highly collaborative, college-wide review process which resulted in statements that articulated more explicitly the university's commitment to its Mercy heritage, liberal arts tradition, diverse and inclusive culture, and concern for student well-being. Highly stable, the mission and core values were reviewed and updated in 2012 to reflect the university's transition to university status and in anticipation of a comprehensive review and revision of the university's liberal arts curriculum that led to the REACH core and the outREACH initiative (S1.C1: Mission and Core Value 2012 Update). As documented in the committee minutes of both the mission subcommittee of the Board of Trustees and in the Board's general minutes at their February 2021 meeting, the new approach to the liberal core curriculum represented a significant rededication to the university's mission and Catholic identity (S1.C1: Mission BOT Subcommittee Minutes 02-2021).

Review and renewal of the university's mission and core values have been the central principles guiding the university in developing and implementing a successful approach to comprehensive strategic planning. Specifically, the 2018-2020 Strategic Plan, "Renewal Through the Mercy Mission," which was extended to 2021 due to the global pandemic, took as its starting point the need to align all strategic initiatives with the mission. Within the list of charges given to the Strategic Plan Steering Committee was the charge to reaffirm the mission (S1.C1: 2018-2021 Strategic Plan Steering Committee Charge). Further, the 2021-2024 Strategic Plan, "Mission Inspired. Future Ready.," approved and implemented in June 2021, presents objectives arranged around the categories of the core values of the university (S1.C2, S1.C3: 2021-2024 Strategic Plan). Each goal of the 2022-2027 strategic plan, currently being developed, links to mission: Student Experience, Organizational Culture, External Engagement, and Institutional Vitality.

Embedding Mission into the Student Experience

The mission and core values of the university are infused into the organization and supporting frameworks that constitute the identity and operations of Mercyhurst. In no area is this mission and Mercy spirit more evident than in the programming and services supporting the experience of the Mercyhurst student. With an urgency and vitality captured in the motto *Carpe Diem*, the mission surrounds the students in every aspect of academics and student life, in line with *Requirement of Affiliation 7*.

Academics

Under the direction of the vice president for academic affairs and the academic colleges through the college deans, and as the foundation of the student experience, the Office of Academic Affairs (OAA) plays a vital role in ensuring the university's commitment to the mission, core values, and goals. The presence of mission in academic affairs can be felt in nearly all aspects of academic operations from the OAA Mission and Vision Statements to the spirit of mission and Mercy in programs designed to support teaching and learning, such as the Keep Teaching initiative which provided resources and support for classroom instructors responding to the challenges of converting almost overnight to remote instruction during the spring 2020 global pandemic lockdown (S1.C3: OAA Mission and Vision Statement; S1.C3: Keep Teaching Toolkit).

At the structural level, the university maintains a clear focus on developing and supporting programming consonant with the values inscribed within the mission and the legacy of the Sisters of Mercy, whose commitment to education resonates with both the previous and current strategic plans and in line with

Requirement of Affiliation 10. For example, as part of updating the 2018-2021 Strategic Plan, the university operationalized two strategic goals: one for non-traditional students and one for community and national partnerships. With a particular focus on graduate students and veterans, this strategy was targeted toward making a Mercyhurst education accessible to students from all backgrounds, especially non-traditional students (S1.C3: 2018-2021 Strategic Plan).

In terms of mission ties to curricula, nearly half of the general education course requirements for degree completion are directly linked to the university's mission: two dedicated courses in REACH through the Reason & Faith component plus four dedicated courses in the outREACH initiative. These are described in more detail in Chapter 5 (S1.C1, S1.C3: Undergraduate Catalog – REACH; S1.C3: outREACH Overview).

In addition to the REACH and outREACH curriculum, the university demonstrates a strong commitment to mission and goals through academics, including academic programming that:

- aligns with the Critical Concerns of the Sisters of Mercy, such as Sustainability Studies and Environmental Science;
- is specifically designed to help students acquire foundation skills before entering a professional program, such as the associate degree in Health Studies;
- incorporates community engagement and service-learning programs as well as study abroad opportunities to emphasize the diverse experience with others;
- and provides opportunities for students to develop skills in leadership and the dignity of work through experiential learning, internships, and clinical experiences.

Recognizing that scholarly and creative inquiry extend beyond the traditional classroom and academic programs, Mercyhurst also supports a number of critical initiatives that demonstrate a strong commitment to mission such as the following:

- The Evelyn Lincoln Institute for Ethics and Society (ELIES) offers public lectures and panel discussions on various contemporary ethical issues and coordinates with the community through projects (S1.C3: ELIES Events).
- The William C. Sennett Institute for Mercy & Catholic Studies focuses on innovative efforts to enhance the mission of Mercyhurst University through events, such as the annual fall lecture addressing significant topics in Catholic theology and thought (S1.C3: Sennett Institute Events).
- The Mercyhurst Institute for Arts & Culture (MIAC) and the Mercyhurst Performing Arts, through the departments of dance, art, and music, engage the mission and core values in conscious and meaningful ways (S1.C3: MIAC Events).

Beyond the Classroom

Always a priority of the university, the presence of mission and goals in supporting the student experience has become increasingly explicit and evident since the implementation of the 2018-2021 Strategic Plan. Three specific undertakings demonstrate the university's strategic efforts to ensure a mission-infused student experience beyond academics: a substantive commitment to supporting students, particularly in the areas of diversity and inclusion and non-traditional students; a focused plan for infrastructure improvement in support of campus life; and efforts to provide high-quality resources to improve university operations. One example of how each of these efforts came together is in the remodeling of the Motherhouse to meet the needs of our nursing

program students. The convenient location for the largely commuter-student base and enhanced access to campus amenities and services is only one example of how resources are being thoughtfully directed to meet the needs of the non-traditional students in these programs.

Mission is also strongly evident in the university's explicit commitment to supporting diversity and inclusion and non-traditional students. For example, a Diversity and Inclusion Task Force was established in 2016 as part of the commitment to mission renewal. More recently, the Presidential Advisory Council for Diversity, Equity, Inclusion and Justice (DEIJ) was formed in Fall 2021 (S1.C1, S1.C2: Diversity, Equity, Inclusion, and Justice Initiatives Summary).

Ensuring Quality

At all levels of governance, mission provides the centering principle around which the university's critical leadership structures are framed, starting with the Board of Trustees. For example, the bylaws of the Board of Trustees clearly establish the Board as having primary oversight and governance of the university and designate university's mission and purpose as the Board's first responsibility, in line with *Requirement of Affiliation 10* (S1.C1: Bylaws of Mercyhurst University; S1.C1: Mercyhurst University Trustee Charters). In addition, mission presence is further reinforced by the continued presence of the Sisters of Mercy on the Board of Trustees with the requirement that the membership of the Board must include at least two members of the Institute of Sisters of Mercy of the Americas or lay individuals who have been designated by the Sisters as their representatives. Currently, two sisters serve on the Board, one of them on the executive committee. Each Board of Trustees meeting concludes with a brief discussion about how the business of the Board conducted at that meeting supports and reflects the mission.

Also reinforcing mission is the primary administration of the university, conducted by the president and the president's cabinet. The vice president for mission serves on the cabinet (S1.C1: Mercyhurst University Cabinet Organizational Chart 2021-2022). The vice president for mission meets biweekly with the university's president, ensuring the presence of a mission-focused perspective in administrative planning and decision-making, in line with *Requirements of Affiliation 10 and 12*.

Assessment of the Mission is carried out on a variety of levels, and with both internal and external input. Though the Mission is a constant guide at the institution, the Board of Trustees recognized the need for a clearly articulated review process. As such, the mission subcommittee of the Board of Trustees voted to formalize the mission evaluation process with a review every three years (S1.C4: Mission BOT Subcommittee Executive Summary 05-2021). As mentioned above, the institutional also regularly participates in the CMHE mission peer review process.

COVID-19

The university's response to the challenges of the global pandemic is grounded firmly in its mission and core values. The primary focus has been on creating clear policies and procedures in the context of living out a mission commitment to "human and spiritual values" and to demonstrating what it means to be both "socially merciful" and "compassionately hospitable." For example, the university prioritized health and safety for the entire community with a particular focus on meeting the needs of more vulnerable populations. After the initial lockdown, when campus services began to re-open starting in summer 2020, the university used its Americans

with Disabilities Act (ADA) review process to enable employees with specific medical concerns to be cleared to continue work fully remote (S1.C1: ADA Accommodation Process). When the campus opened in fall 2020 for classes, this process enabled faculty members with documented health concerns to be assigned synchronous-only remote status, allowing them to teach their courses fully remote through videoconferencing tools. The university also implemented policies to allow employees to transition to remote work when local K-8 schools were closed or in remote-learning. The university implemented guaranteed paid sick time for employees to ensure that a COVID illness or suspected COVID illness would not result in lost pay (S1.C1: COVID-19 Prevention, Mitigation, and Response Policy). In keeping with the university's commitment to the community and to strengthen the quality of care, the president assigned a Pandemic Officer and established the COVID-19 Task Force, comprised of faculty members and staff whose expertise spanned the range of challenges posed by the pandemic from health services to epidemiology to public health. The university's particular focus on mission as it informs the student experience showed itself in a range of policies and activities, such as investing significantly in upgrading classrooms with cameras and technology to allow students to engage fully in classes from remote locations or creating a clear system within Self-Service to document and monitor students as fully or temporarily remote, facilitating their engagement in classes and continuing their academic success. The university's commitment to student-centered, mission-driven action manifested fully in spring 2020 when the pandemic forced campus closure, and the students were sent home to complete the academic term remotely. Amidst Covid-19, the university demonstrated its pastoral concern for students through an effort to reach out personally to every undergraduate student in the "Spring 2020 Student Connection" initiative (S1.C1, S1.C3: Spring 2020 Student Connection Summary). Nearly 70 employees made phone calls followed by (if necessary) email outreaches to over 1,700 students.

Key Findings

- The university demonstrates a clear commitment to ongoing mission renewal through the explicit presence of mission, core values, and Mercy heritage in all aspects of operations, particularly in the previous and current university strategic plans. Embraced by stakeholders from the Board of Trustees to administration, staff, faculty, students, the mission, core values, and Mercy heritage are present in the daily lives of the university community in countless ways, such as the Mercy Emissaries Program, Mercy Week, and Mass of the Holy Spirit.
- The innovative outREACH initiative builds on the university's already vigorous expression of student learning in the university's mission, core values, and Sisters of Mercy heritage within general education and academic curricula and provides invaluable assessment of mission and Mercy integration over the four-year undergraduate matriculation.
- The university has affirmed its identity as a Catholic university in the liberal arts tradition founded by the Sisters of Mercy through deeper ties with CMHE and a robust commitment to mission in corporate governance through, for example, the Mission Committee of the Board of Trustees and the cabinet level service by the vice president for mission.
- Through focused attention to diversity, inclusion, and opportunity for non-traditional student populations, the university strives to fulfill the promise of the mission and honor the legacy of the Sisters of Mercy.

Current Initiatives

- Through the Self-Study process, it was realized that the university did not have a clearly outlined plan for periodically assessing the mission. As such, the Board of Trustees formalized a process whereby an ad hoc committee will be formed every three years to review the mission, vision, and core values.

Opportunities for Improvement and Innovation

1. It is recommended that the university continue its current efforts toward operationalizing assessment for the student services units and toward creating a culture of documenting the mission impact on decision making and particularly in resource allocation.
2. It is recommended that the university continue its efforts, as resources allow, to revitalize and enhance programs and support structures consistent with its Sisters of Mercy heritage, such as compensation, support for student and faculty scholarly and creative inquiry, and environmental sustainability.

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Chapter 4: Standard II – Ethics and Integrity

Ethics and integrity are central, indispensable, and defining hallmarks of effective higher education institutions. In all activities, whether internal or external, an institution must be faithful to its mission, honor its contracts and commitments, adhere to its policies, and represent itself truthfully.

Overview

Mercyhurst University meets the requirements of Standard II. A full description of the ways Mercyhurst University meets the nine criteria and all applicable sub-criteria of Standard II, as well as the *Requirements of Affiliation* 1, 4-6, 8, and 11-14, are presented throughout this chapter.

Ethics and integrity are essential to the fabric of effective higher education institutions. Mercyhurst University adheres to these core values operating in an ethical and responsible manner throughout its interactions with students, employees, and the external community. The university's dedication to the principles of ethics and integrity are evident in its published documents, particularly the Faculty Handbook, Employee Handbook and Course Catalog, which are updated annually and easily accessible online through the university's Hub. It is also evident through numerous policies, actions, and procedures that evidence the university's commitment, grounded in its mission and Mercy heritage, to ensuring academic freedom, fostering a climate of respect on the campus community among all constituents, working to resolve differences in a fair and impartial manner, avoiding conflicts of interest by employees and the administration, maintaining honesty and accuracy in all internal and external messaging, addressing concerns from all constituents, and reporting all required information to federal, state, and accrediting bodies in an accurate and timely manner.

Ensuring a Culture of Academic Freedom

According to the American Federation of Teachers, "Academic freedom is the right of faculty members, acting both as individuals and as a collective, to determine without outside interference: (1) the college curriculum; (2) course content; (3) teaching; (4) student evaluation; and (5) the conduct of scholarly inquiry." Using this schematic definition, Mercyhurst University demonstrates clear commitment to academic freedom as a core element in the educational experience. The university's Faculty Handbook opens with an unambiguous declaration that the university adheres to the "Statement of Principles on Academic Freedom and Tenure," issued by American Association of university Professors in 1940 (S2:C1: Faculty Handbook p.2). Moreover, the university operationalizes that commitment by ensuring that faculty contribute regularly, freely, and significantly to the formation and reformation of the university's liberal arts core curriculum and the curriculum of its various departments and programs and their respective majors and minors. Section IV part B of the Faculty Handbook identifies as a critical role of the faculty "leadership in the educational mission of the university." The role of the faculty in initiating, reviewing, and recommending curriculum and related policies is further secured in two critical ways (S2.C1: Faculty Handbook p.34).

First, as detailed in the Faculty Handbook, faculty exercise direct influence over the curriculum through committees charged with curricular review and recommendation (S2.C1: Faculty Handbook p.27). Second, direct faculty influence on the curriculum is further ensured by the university's processes for proposing new programs

and courses, as well as revisions to existing programs and courses (S2.C1: New Program Application; S2.C1: New Course Approval Form).

Clear evidence of the university's commitment to academic freedom, as the central role faculty play in curriculum, can also be found in assessment planning and implementation processes. Faculty determine course learning outcomes and their related importance, as well as define the levels of student achievement and the measurement and assessment of that achievement. As evidenced by range and depth of intellectual diversity displayed in the Syllabus Repository, faculty are empowered to determine and employ the teaching philosophies and methodologies they think best suited to carry out their professional responsibilities in the classroom (S2.C1: Syllabus Repository Sample).

Creating a Climate of Respect

The university is committed to a campus climate that promotes respect and understanding among students, staff, faculty, and administration, through inclusive policies, practices, and programs that encourage respect, integrity, and creativity in a supportive academic environment. In addition, to ensure that students, employees, and faculty from diverse backgrounds feel welcome to apply to study and work on the campus, the Office of Human Resources includes the university's non-discrimination policy on every employment position posted both internally and externally (S2.C2: Employee Handbook p.11; S2.C2: Faculty Handbook p.91; S2.C2: Student Handbook p.25).

Furthering efforts to create a climate of respect and consistent with initiatives outlined in the 2018-2021 strategic plan, the university has taken significant action over the past several years to target resources and programming in support of diversity and inclusion as central to the mission and core values. Targeted focus within the previous strategic plan has resulted in significant programmatic development, including the establishment of the Multicultural Activities Council (MAC) and the creation of a Diversity and Inclusion Coordinator position within the Campus Involvement Center (CIC) to ensure that students from diverse cultures, races, ethnicities, genders, and sexualities have their needs and interests represented in student programming and events. In 2020, the university added the position of Officer for Equity, Inclusion, and Justice, currently held by a Sister of Mercy, who regularly attends recognized student club and organization meetings, such as the Black Students for Unity group. Diversity and inclusion staff focus on programming and pastoral presence as essential supports for students who might otherwise feel marginalized on campus. In addition, the university evidences its commitment through focused diversity and inclusion staff programming, such as the LGBTQIA Allies Program (S2.C2: Diversity, Equity, Inclusion, and Justice Initiatives Summary).

As a mission-centered university in the Catholic tradition, Mercyhurst draws upon a range of support units in ensuring a respectful, inclusive, and welcoming campus environment. Campus Ministry, which supports all faith traditions through a strict anti-proselytizing policy, works to create a hospitable environment for the spiritual development of the university community through a variety of different initiatives (S2.C2: Campus Ministry Overview). The university also recognizes that a commitment to diversity and inclusion must also respect class and poverty as essential experience dividers, especially on college campuses. In response, the university offers a range of services for those who may be struggling financially (S2.C2: Mercy Market Overview).

In addition to creating respect, the culture of care and compassion for those who work at Mercyhurst is evident in a number of initiatives. For example, the Staff Senate serves as a conduit between staff and administrators, ensuring that all voices are represented. The Staff Senate also hosts yearly events, the Health and Wellness Fair and the Employee Professional Development Days, that put this climate of care and concern into action (S2.C2: Employee Development Examples).

Honoring the Dignity of Work

Grievances

Consistent with the mission commitment to an appreciation of the dignity of work, the university is committed to establishing and implementing fair and impartial policies that address complaints or grievances raised by all members of the university community and to ensuring that concerns are heard and addressed appropriately and equitably. For example, the Student Grievance Policy is clearly articulated in the Student Handbook and published on the university website under the “Student Consumer Information.” The policy on the Student Consumer Information page outlines who to contact with complaints and how the grievance is progressed in seeking resolution to numerous types of complaints or concerns (S2.C3: Student Handbook p.103; S2.C3: Student Consumer Information Website).

Employee grievance policies and procedures are addressed in the Employee Handbook and the Faculty Handbook (S2.C3: Employee Handbook p.21; S2.C3: Faculty Handbook p.89). Section V of the Faculty Handbook also contains specific policies regarding grievances related to termination, reappointment, and dismissal for cause, as well as within the tenure and/or promotion processes.

Conflict of Interest

In fostering an environment that honors the dignity of work, Mercyhurst is committed to the avoidance of conflict of interest and/or the appearance of such conflict in all activities and among all constituents, as demonstrated by the policies and procedures found in various resources and in line with *Requirement of Affiliation 13* (S2.C4: BOT Conflict of Interest Disclosure Statement; S2.C4: BOT Confidentiality Agreement; S2.C4: Faculty Handbook p.39; S2.C4: Employee Handbook p.10).

Fair and Impartial Employment Practices

Through the Employee Handbook, the university provides detailed information to all employees about policies and procedures meant to ensure fair and equitable practices in employment matters and to foster a positive work environment consistent with the university’s core values (S2.C5: Employee Handbook p.22).

As an equal opportunity employer, Mercyhurst University maintains fair and impartial hiring practices that prohibit discrimination in admissions, recruitment, and employment. As noted above, the university’s non-discrimination policy is included on every employment position posted both internally and externally. To ensure consistency, all departments at the university follow the same procedure when seeking permission to create a new position. As detailed on the Personnel Requisition Form, approval to hire is granted through a process that flows from the department through the area vice president to the cabinet budget team (S2.C5: Personnel Requisition Form; S2.C4: Personnel Action Form).

Maintaining Honesty and Truthfulness in Public Communications

Mercyhurst is committed to demonstrating honesty and truthfulness in public relations announcements, advertisements, recruiting and admission materials and practices, as well as in internal communications. In outlining how information is to be communicated to internal and external audiences, the marketing department's Brand Guidelines provide an apt expression of this commitment, emphasizing authenticity as the primary goal in stating, "We're genuine and sincere. We tell the story and communicate transparently. We back up assertions with facts and speak frankly" (S2.C6: University Branding Standards). In addition to open and honest communication via university publications, such as *the Tide* (formerly the *Buzz*) and *Mercyhurst Magazine*, the university holds regular gatherings of the community to share information and respond to questions (S2.C6: University Communications Samples).

The university's commitment to authenticity is further evidenced in how the university approaches sensitive public communications. For example, when the university announced the consolidation of the North East campus, university officials were diligent in their efforts to be open and honest about the eventual consolidation of the North East campus, recognizing what this would mean for student populations, employees, and the town of North East, Pennsylvania. University vice presidents met individually with community stakeholders and spoke directly to the regional community through local news (TV and print). The university created and updated a designated webpage to explain the decision, walk the public through the process, and provide details on how the decision would affect current and prospective students (S2.C6: Mission Inspired Future Ready Website).

In the area of advertisement and admissions, the marketing department's Branding Standards Manual also demonstrates the university's commitment to transparency and data-driven accuracy in information. For example, in recruitment marketing, assertions about academic programs and student outcomes are supported by data and analysis and communicated with stakeholders, in line with *Requirement of Affiliation 8* (S2.C6: Physician Assistant Program Website). Finally, as the often "first face" of Mercyhurst for potential new students visiting the campus for the first time, student Ambassadors are rigorously trained to ensure they are providing the most accurate information possible about the university to prospective students and families during visits (S2.C6: Mercyhurst Student Ambassador Training Materials).

Demonstrating Mission Integrity in Affordability and Student Financial Knowledge & Acuity

Mercyhurst's mission grounds its actions in educating students whose choices will "enable them to realize the human and spiritual values embedded in everyday realities and to exercise leadership in service toward a just world." Moreover, through its core values, the university seeks to be "reflectively aware," dedicated to fostering an environment that "ultimately offers the opportunity to develop a moral compass for a life of integrity." In accord with these commitments, the university strives to promote affordability and accessibility to prospective and current students through various policies, practices, and programs that are made available to all.

Affordability

Recognizing the need to ensure affordability according to the Mercy mission of service and education for all students, Mercyhurst University is committed to a variety of programs that reduce students' financial burdens. This commitment begins with resources to help students and their families complete the FAFSA process, which is required for all institutional aid, and continues through awarding of financial aid and management of payment plan options for outstanding balances through a partnership with Nelnet/TMS.

By several means, the university actively assists students with reducing the overall cost of attendance. A purposely designed billing structure is one of the ways Mercyhurst ensures affordability: operating on a flat-rate billing model allows students to take between twelve and eighteen credits per semester as part of the standard rate. This billing model thus increases the students' flexibility in planning course paths, which in turn facilitates their timely graduation. The university also offers several options for students to receive credit for life experience and prior learning, such as advanced placement credits, which reduces time and expense further. In addition, reduced tuition rates are extended to students in populations central to the Mercy mission, such as local high school student affiliates, associate degree students, veterans, and adult students.

Representative of the Mercyhurst commitment to an affordable education are two scholarship programs: the Beyond Scholarship and the Erie Promise Grant. The Beyond Scholarship is specifically for students who identify as BIPOC and who may otherwise not be able to afford higher education. Launched in the fall of 2021 and with four active students, this program's goal is to connect promising students with world-class education and experiences that will positively influence their lives and broaden their possibilities. The Erie Promise Grant is a direct fulfillment of Mercyhurst's stated community support, wherein local students will have 100% of their unmet tuition costs covered during their first year of study. Approximately 150 students have received this award over the past two academic years, and the university will continue assessing student success as they continue through their degree programs (S2.C7: Student Scholarship Programs).

Finally, the university provides a range of opportunities to support students in funding their higher education. In addition to institutional aid in the form of scholarships, students can also earn money on campus by applying for institutional work-study programs (S2.C7: Work Study Program Documentation). In 2021-2022 alone, the university awarded approximately \$34.8 million of direct student aid.

Table 3 Financial Aid Distribution Summary for 2021-2022 Academic Year

| Award Type | Total Funds | % of total |
|------------------------------|--------------------|-------------------|
| Federal Grants | \$6,700,338 | 6% |
| State Grants & Scholarships | \$2,878,942 | 3% |
| Institutional Aid, all types | \$64,311,810 | 58% |
| Outside Scholarships | \$1,425,214 | 1% |
| Work Study Programs | \$805,755 | 1% |
| Loans | \$34,833,484 | 31% |

Student Financial Knowledge & Acuity

University admissions prioritizes transparency in communicating information about financial aid and scholarships to students and their families (S2.C7: Financial Aid Admissions Materials). Student admission visits include options for focused meetings with students and families about the financial aid process. As part of the accepted student admission packet, students receive detailed information about the preliminary financial aid offer that breaks down what each number in the offer means to ensure transparency on scholarships versus loans (S2.C7: Preliminary Financial Aid Offer Sample). All students are assigned a Student Financial Services (SFS) counselor to whom they can address any concerns regarding billing, loans, payments, or other financial questions, and students can schedule to meet with their assigned SFS counselor through the university's Hub.

Students are also provided a net price calculator on the university's website to assist them in understanding more clearly the true cost of their education (S2.C7: Net Price Calculator).

To ensure that students are provided with accessible and accurate information crucial to their understanding of finances, the undergraduate and graduate course catalogs provide a full breakdown of tuition, fees, room and board, loan and grant education, the financial aid awarding process, campus amenities, SFS calendar and procedures, and enrollment requirements (S2.C7: Undergraduate Catalog – Student Financial Services; S2.C7: Graduate Catalog – Student Financial Services). In addition, the financial aid webpages also provide information on federal, state, and external scholarship opportunities, including information about state, federal, and private funding sources and university scholarships based on academic merit, financial need, and athletic and artistic performance. Students are also provided information about scholarship criteria and parameters, such as renewability and GPA minimum requirements (S2.C7: Student Financial Services Hub Site; S2.C7: Student Financial Services Website). To support students in managing student debt, students are required to take the Entrance Loan Interview provided by the federal government and an Exit Loan Interview prior to graduation (S2.C7: Entrance and Exit Loan Interviews). In addition, students are made aware of alternative methods to repay student loans through post-graduate service programs, such as AmeriCorps.

Meeting Compliance Requirements

In line with *Requirement of Affiliation 1*, Mercyhurst University is authorized by the Pennsylvania Department of Education as an institution of higher education. Multiple documents demonstrate the university's compliance with all reporting requirements for applicable federal, state, and Commission reporting policies, regulations, and requirements, including *Requirement of Affiliation 8* (S2.C8: Mercyhurst Compliance Report 02-16-22). For example, the university makes accessible to the general public through a variety of sites a full disclosure of current information on institution-wide assessments, graduation, retention, certification and licensure or licensing board pass rates. The Student Consumer Information site provides links to several different applicable sources of information, including the Student's Right-to-Know Act, Information and College Navigator sites, graduation rates, licensing and accreditation, and retention rates (S2.C8: Student Consumer Information Website). In the area of assessment, the external website presents the Assessment and Planning page, which includes information about university strategic planning, institutional research, and compliance. In addition, the Accreditation landing page provides a listing of all the accreditations at the university for each program, as well as related contact information for each agency (S2.C8: Institutional Effectiveness Website).

The university also demonstrates compliance as it relates to the various reporting requirements by the federal and state governments as well as other agencies, in line with *Requirements of Affiliation 5, 11, 12 and 14*. For example, the university submits on an annual or scheduled cycle for assessment, numerous reports, statistics, surveys, and self-studies that provide public external reporting of critical operations data, including but not limited to audit reports, the Clery Report, graduation reports, licensure, and certification pass rates, departmental accreditation self-studies, the National Collegiate Athletic Association (NCAA) academic success rate, and PDE Assurance of Compliance which includes information about the university's governance structure. These reports, which are updated and disclosed in a timely manner, are prepared through a comprehensive and collaborative approach with the Offices of Academic Affairs, Enrollment Management, Assessment and Planning Department-Institutional Research, Student Financial Services, and Admissions, among others.

In addition to meeting external compliance requirements, Mercyhurst remains committed to meeting the MSCHE Requirements of Affiliation, standards, and policies. As highlighted throughout this self-study report, the university maintains compliance with all *Requirements of Affiliation*, specifically 4 and 6. Examples of how the institution demonstrates compliance with MSCHE processes and policies include:

- timely submission of routine reporting requirements such as the Annual Institutional Update and participation in the Mid-Point Peer Review process, coordinated through the Office for Institutional Effectiveness (OIE);
- ongoing monitoring of proposed and accepted updates to MSCHE Policies to ensure ongoing compliance at all levels, coordinated by the Accreditation Liaison Officer;
- submission of the Substantive Change for Closure of the North East Branch Campus in Fall 2019 as well as the extension request necessitated by the consolidation timeline (S2.C8: Substantive Change for the Closure of the North East Campus).

The university also conducts Compliance Workshops to ensure departments across the university are aware of their vast compliance obligations, and to provide a venue to discuss recent changes in legislation or practice that impact the university's compliance program. The workshops are typically held annually or biennially and the content from one year to another may change dependent on areas of focus that arise through legislation or the university's annual risk management process (S2.C8: Compliance Workshops). The first Compliance Workshop was held in 2012, with six additional annual workshops held through 2019. The 2021/2022 workshop is scheduled for March 2022 with a focus on mandatory reporting across several regulations including Title IX, Clery Act/CSAs, and Clearances/PA Child Abuse legislation (S2.C8: 2020-2021 Compliance Matrix). The university also maintains a Compliance Matrix to identify the Cognizant Policy Officer and compliance partners across the university. This matrix is maintained by the Office of General Counsel and distributed annually to the Cognizant Policy Officers.

The university also engages in annual risk management reporting to its Board of Trustees through the Audit Committee. While these reports are confidential and subject to attorney client privilege, the template and outline of these reports provides key information on the timeline and process of conducting risk assessment at the university related to the most significant risks facing the institution (S2.C8: Risk Summary and Report Template).

Ensuring Vitality in Ethics and Integrity Standards

Mercyhurst University engages in regular review of the ethics and integrity standards and policies. Informal evaluations occur each time a concern or incident, however large or small, is brought to the attention of the administration. Ongoing evaluation leading to change is evident in the annual review of both the faculty and employee handbooks, as well as in adaptations of policy over time, such as the updating of the Human Resources site on the Hub, revamping of Title IX response procedures, and the enhancing of the parental leave policy to improve its effectiveness at providing new parents with guaranteed paid time off, regardless of whether they have existing sick or vacation days in their "leave bank." The university has an extraordinary record for agility and flexibility in meeting the needs of the community and for ongoing monitoring and evaluation underpinning effective, and when needed, rapid response. These attributes were particularly evident

during the global pandemic as policies and procedures were not only developed and implemented quickly and efficiently, but also made accessible and communicated widely through the Hub and university websites.

Formal evaluations of policies occur on specific dates established when the policies were implemented. While annual review is expected, in practice, policies are typically reviewed more frequently due to changes in operations that require various updates (S2.C9: Policy Template). Policy enactment occurs in line with the university's Policy on Official Policies which establishes the process for creation, dissemination, and termination of official university and department policies (S2.C9: Policy on Policies). Procedures for policy revision at the university take place on a variety of levels, including by Office of the General Counsel for legal and risk analysis, through human resources for use analysis, and by various stakeholders, including the president's cabinet, academic affairs, and the various Board of Trustees and university subcommittees responsible for campus and community well-being.

For example, the university underwent a rigorous evaluation of its policies and procedures as consistent with its mission and Mercy identity in 2020 through the Conference for Mercy Higher Education (CMHE) Self Study (S2.C9: CMHE 2020 Self-Study). Based in part on this evaluation, the Mercy Emissaries program was expanded and mission links to the budgeting process were strengthened. Another example of the university enacting formal assessment of university ethics and integrity is the Diversity and Inclusion Taskforce (DIT), formed in 2016. The taskforce evaluated campus policies, processes, and practices and determined that a new student government council was needed, leading in 2017 to the establishment of the MAC. Another example is the 2020 Equity, Justice, and Inclusion Initiative that resulted from the DIT study of campus life in the context of multiculturalism, racism, and privilege, which led to the establishment of Strategic Goals for Equity, Inclusion, and Justice. In Fall of 2020, a part-time employee was appointed to the position of Officer for Equity, Inclusion and Justice, regularly meeting with the President and Vice President for Mission amidst various efforts to educate and engage the community in programs such as book discussions, training sessions, and speakers. The Presidential Advisory Council for Diversity, Equity, Inclusion and Justice (DEIJ) was formed in Fall 2021. This council is comprised of faculty, staff and students who work with the president to identify strategic goals and actions for ongoing diversity, equity, inclusion, work at the university. Through retreats and ongoing meetings, this council is developing a university strategic plan for DEIJ in spring 2022 (S2.C9: Diversity, Equity, Inclusion, and Justice Initiatives Summary).

Other evidence of continuous review includes the Administrator Evaluation Committee of the Faculty, which ensures ethics and integrity in leadership through regular evaluation of academic administrators (i.e., deans and the vice president for academic affairs) and provides a confidential summary report of job performance based on the respective job description, including the demonstration of ethics and integrity in relation to the mission of the institution (S2.C9: Faculty Handbook p.25). At the department/program level, assessment processes are linked to unit mission and goals as aligned with the university's strategic plan and core values. Specific guidelines are provided in the Assessment Handbook (S2.C9: Assessment Handbook). In addition, internal and external review processes linked to outside accreditation, such as nursing, have additional ethics and integrity criteria and measures (S2.C9: NLN-CNEA Standards). In sum, Mercyhurst has created a culture of assessment that contributes significantly to the creation of a culture of ethics and integrity, enhances the factual basis needed for understanding and decision-making, and ensures the accountability of all stakeholders involved.

COVID-19

The university's commitment to ensuring ethical operations and integrity in fulfilling the mission of the institution was unwavering during the global pandemic. For example, the ongoing commitment to transparency in communications was demonstrated in fall 2020 when a spike in COVID-19 cases on campus prompted the university to move to a remote mode of course delivery and instruction. The vice president for student life, also serving as the university's Pandemic Officer, was made available for comment on the situation and the response of the university (S2.C6: Resilience & Resolve Website). Emphasizing transparency and committed to clear communication of the facts, the university provided a thorough explanation of what appeared to have happened, how they were discovered, and what it meant for the community. This dedication to ethical decision-making and honest communication remains consistent throughout the pandemic as well as in all day-to-day operations, as evidenced through the creation and ongoing use of a COVID hotline and centralized email system to address and resolve concerns (S2.C6: COVID Sample Email Responses).

Another example of how the institution engages in ethical practices can be found in the policy adjustments that were necessitated in response to the pandemic. For example, the COVID-19 Prevention, Mitigation, and Response Policy was updated on an almost monthly basis throughout 2020 and 2021 to keep up with changes at the Centers for Disease Control and local health department.

Key Findings

- As the core element of the academic mission, the university seeks and retains a highly qualified and dedicated faculty that is committed to high quality teaching, supported in scholarly and creative work, and dedicated to academic freedom at both the program and course level.
- The university demonstrates significant progress in providing substantive support in programming, policy, and personnel in administrative areas essential to the commitment to honor the dignity of work, particularly in human resources and through critical compliance, such as Title IX and ADA.
- Committed to transparency in interactions with students, the university has significantly expanded its efforts to provide students with access to information and clear communication about all areas relating to matriculation, including, for example, admissions, enrollment, financial aid, and degree completion.
- The university reviews policies and procedures relating to ethics and integrity, both informally, as through regular review and updating of faculty, student, and employee handbooks, and formally, as through the CMHE Self-Study.

Current Initiatives

- The Student Consumer Information website has been significantly expanded beyond only matters of compliance to include more robust information for students.
- In order to enhance sustainability of a variety of human resources practices and continue engaging with integrity, efficiencies in all HR systems have been built and the employee performance review process was improved.

Opportunities for Improvement and Innovation

1. It is recommended that the university continue its progress toward robust performance review processes for all employees and that these processes have clearly articulated links to the university mission and core values.

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Chapter 5: Standard III - Design And Delivery Of The Student Learning Experience

An institution provides students with learning experiences that are characterized by rigor and coherence at all program, certificate, and degree levels, regardless of instructional modality. All learning experiences, regardless of modality, program pace/schedule, level, and setting are consistent with higher education expectations.

Overview

Mercyhurst University meets the requirements of Standard III. A full description of the ways Mercyhurst University meets the eight criteria and all applicable sub-criteria of Standard III, as well as the *Requirements of Affiliation 2, 5, 8, 9, and 15*, are presented throughout this chapter.

Mercyhurst University takes great care to provide a robust educational experience guided by the mission and core values of the institution and driven by excellence in teaching. Direct emphasis on the Mercy mission is placed throughout the curriculum. The core values connect all the components of a Mercyhurst education, encompassing both curricular and co-curricular experiences across undergraduate, graduate, and certificate programs as faculty and staff guide students through their educational development in becoming individuals who are socially merciful, globally responsible, compassionately hospitable, intellectually creative, and reflectively aware ambassadors of service. The university-wide student learning outcomes of civic engagement and intercultural skills, critical and creative thinking, effective communication, information literacy, quantitative and scientific reasoning, and ethical reasoning are embedded throughout the curriculum and involve the full faculty in development and assessment of these learning outcomes.

The curricula across all degree programs are intentionally designed and assessed for appropriateness to provide coherent and rigorous student learning experiences, regardless of modality of instruction, in line with *Requirement of Affiliation 9*. Detailed information about all program requirements is made available to prospective and enrolled students through a variety of sources, including the university's website, undergraduate and graduate course catalogs, student handbooks, program specific documents, admission and marketing materials, open houses and information sessions, Day-In events, orientation sessions, faculty advising, and academic support.

Committing to the Liberal Arts: General Education Curriculum

As the foundation of a Mercyhurst University education, the general educational curriculum is designed to provide undergraduate students with a broad liberal arts educational experience aligned with the university mission and core values and Mercy tradition. The general education program, called REACH and described in detail below, is consistent with the mission and tradition, which recognizes both the power and beauty of the liberal arts and the dignity of work. While freestanding, REACH intersects with courses in the academic programs, challenging students to become mature, well-rounded individuals who can succeed within and beyond their fields of study.

The REACH curriculum is grounded in the university-wide learning outcomes, which reflect the university's core commitment to provide an education that incorporates cultural and global awareness as well as cultural sensitivity, oral and written communication, scientific and quantitative reasoning, critical and creative analysis and reasoning, information literacy, values, ethics, and diverse perspectives.

Table 4 University-wide Learning Outcomes

| | |
|--|---|
| Critical and Creative Thinking | <ul style="list-style-type: none"> • Skillfully conceptualize, apply, analyze, synthesize, and/or evaluate information gathered from observations, experiences, reflection, reasoning, and/or communication. • Effectively analyze and critically evaluate information and/or ideas from multiple perspectives in original ways; work in an imaginative methodology characterized by a high degree of innovation and/or divergent thinking. |
| Effective Communication and Information Literacy | <ul style="list-style-type: none"> • Demonstrate effective skills in writing, visual communication, and speaking with clarity, coherence, and purpose. • Access sources and evaluate information that facilitates critical inquiry; adhere to standards of academic honesty. |
| Quantitative and Scientific Reasoning | <ul style="list-style-type: none"> • Use mathematical concepts to make logically sound decisions, judgments, and/or predictions; effectively use scientific inquiry and reasoning to solve problems and analyze and interpret data. |
| Civic Engagement and Intercultural Skills | <ul style="list-style-type: none"> • Develop the knowledge, skills and values to promote a quality of life that is both individually enriching and socially beneficial. • Demonstrate an understanding of cultural diversity and multiple global perspectives in order to interact effectively in multicultural contexts. |
| Ethical Reasoning | <ul style="list-style-type: none"> • Develop informed awareness and understanding of ethical conduct, social responsibility, and academic and professional integrity. • Assess individual ethical values and the social context of problems, recognizing ethical issues in a variety of settings and considering the ramifications of alternative actions. |

The general education curriculum consists of the Freshman Experience, the Liberal Arts Experience, the Senior Experience, and the mission/Mercy curricular experience, outREACH (S3.C3: REACH website; S3.C3 REACH Overview).

The Freshman Experience

Providing the critical foundation in oral and written communication, the freshman experience is comprised of three courses. The first course is the three-credit COMP120 Research and Writing, which is an introduction to academic writing and thought; it is a foundational course in the core commitment to effective oral and written communication (S3.C5: COMP120 Syllabus Sample). Rounding out the freshman experience are two one-credit courses, iMU101 Introduction to Mercyhurst and iMU102 Involvement at Mercyhurst. The iMU courses address smaller cohorts and are led by faculty or other university employees who introduce first-year students to the mission and values of Mercyhurst, help them transition to university life, introduce them to resources and support, and provide them with other relevant information vital to their success (S3.C4, S3.C5: iMU Overview).

The Liberal Arts Experience

The liberal arts core of the REACH curriculum is comprised of a ten-course requirement that students undertake in different disciplines. To ensure that students explore a variety of fields of study and to provide a breadth of engagement, students are required to take two courses in each category, each with a different prefix (S3.C5: Undergraduate Catalog – REACH).

Table 5 Liberal Arts Experience Summary

| | Theme | Applicable Academic Disciplines, any 100- or 200-level course |
|----------|-------------------------|--|
| R | Reason & Faith | Catholic Studies, Philosophy, Religious Studies |
| E | Expression & Creativity | One course in English, plus one course in Art, Dance, Music, or Theatre |
| A | Analytical Thought | Biology, Chemistry, Geology, Mathematics, Physics, Science (including at least one science with a lab) |
| C | Contexts & Systems | Economics, History, Political Science |
| H | Humans in Connection | Anthropology/Archaeology, Psychology, Sociology, World Languages |

Taken together, these five categories, identified by the acronym REACH, provide a literal and metaphorical visioning of student growth and development through the university's core curriculum.

The Senior Experience

The Senior Experience consists of two required capstone experiences: a senior capstone ethics course and a capstone course or equivalent activity within the academic program/major. The first requirement, ETH400 Capstone Ethics, provides both a critical link to the mission and Mercy values inherent in a Mercyhurst education and a significant capstone synthesis of the general education experience (S3.C1, S3.C5: ETH400 Syllabus Sample).

As detailed further below, each student also has an opportunity to demonstrate discipline-specific competency with a separate major capstone experience such as a performance, field experience, or a significant research project (S3.C1, S3.C5: Major Capstone Experience and University Outcomes Alignment).

outREACH

As introduced in Chapter 3, the outREACH initiative builds on the foundation of the other REACH components to expand student learning opportunities grounded in the university's mission, core values, and Sisters of Mercy legacy. Within this particular focus, outREACH provides three designated curricular points of contact that include specific mission-based student learning outcomes and that promote the mercy values that make a Mercyhurst education unique, including the hallmark BTG300 Beyond the Gates course (S3.C5: outREACH Overview).

To address the effectiveness of this mission integration into the curriculum, a longitudinal assessment was created in collaboration with the Office for Global Programs and Experiential Learning and the assessment coordinator with a rubric that allows for evaluation of student responses on a maturational scale. The figure below highlights some of that longitudinal data showing clear maturational growth over the outREACH experience; more detailed analysis is provided in the outREACH Overview.

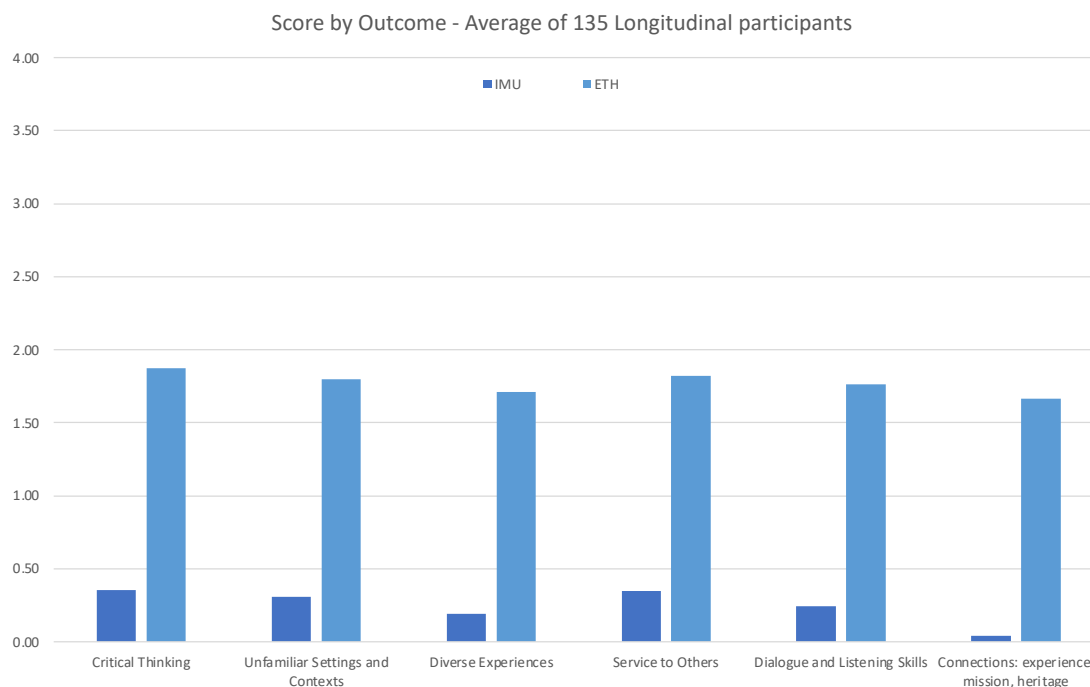


Figure 1 Growth through outREACH experiences

Engaging with the Discipline: Academic Programs

Mercyhurst University offers a wide array of certificate, associate, baccalaureate, and graduate programs leading to a degree or recognized higher education credential, in line with *Requirement of Affiliation 2* (S3.C1: Undergraduate Catalog – Degrees & Certificates; S3.C1: Graduate Catalog – Degrees & Certificates). All academic programs at Mercyhurst University have an assessment plan, coordinated by Office of Institutional Effectiveness (OIE) but owned and maintained by the department. Developed by faculty within the respective departments, the Academic Plan includes the program mission, student learning outcomes, curriculum map, and assessment mechanisms (S3.C1, S3.C8: Curriculum Map Samples; S3.C1, S3.C8: Assessment Plan Samples). As detailed in Chapter 7, regular review and assessment of program mission statements and curricula are undertaken to assure alignment with and support of the university mission and core values. In addition to learning outcomes, programs with discipline-specific accreditation have additional parameters established by the accrediting bodies for both content and objectives (S3.C1: Programmatic Accreditation List).

Academic Programming: Curricula and Expectations

Mercyhurst University has a set of general policies and guidelines that set basic standards for all undergraduate curricula and ensure compliance with state and federal expectations for academic programs, in line with *Requirement of Affiliation 5*. While the curricular details, coursework, and student learning experiences vary widely, all undergraduate curricula offer a capstone course/experience within the major program. These capstones are designed to serve as a culmination of the undergraduate program by providing real-world, outside-the-classroom experiences within the discipline (C3.C1: Undergraduate Catalog – Academic Affairs).

As evidenced in the graduate catalog, the university provides graduate students with a variety of learning opportunities that support the development of research, scholarship, and independent thinking. The resources to support these graduate programs center on research and writing and provide venues to communicate and publish scholarly works, field placement opportunities, and national exam preparation. Many graduate programs offer a research methods course relevant to the discipline and assessed as part of departmental assessment plans (S3.C6: Graduate Research Opportunity Examples).

Graduate programs at the university offer many opportunities for the development and presentation of research and scholarship, including:

- thesis and/or capstone projects in the program of study;
- opportunities to present their research to the faculty and students in their programs and at local, regional, or national conferences;
- university or grant-funded graduate assistantships that allow students to assist faculty with their research and/or other scholarly projects
- formal or informal faculty-mentoring programs in which faculty members work with students on research projects tied to course curriculum in their courses;
- and internship, practicums, and clinical rotations.

Academic Programming: Communicating Requirements

Detailed information about academic programs is available to prospective and enrolled students through a variety of sources, most notably the university's website, the catalogs, and the Hub. The university's website contains information about certificate, associate, baccalaureate and graduate programs including program-specific academic requirements and links to helpful information such as student learning outcomes, concentrations and minors, degree requirements, and related resources, as well as contact information for the department chair and faculty (S3.C3: Program Website Samples). The university's website also enables prospective students to access information about admission events, including Open Houses and Information and Program Spotlight sessions, which provide prospective students with opportunities to obtain more information from program faculty about programs, including degree requirements and time to completion (S3.C3: Prospective Student Website Samples).

University catalogs are electronic, searchable documents featuring main menus that provide easy access to degrees/certificates and course descriptions. For each specific degree, additional details such as a description of the program, the student learning outcomes, opportunities associated with the degree, and a listing of course requirements are displayed. Each course in the requirement list is linked to the course description to create a dynamic user interface that allows for a clear understanding of program requirements (S3.C3: Undergraduate Catalog – Anthropology; S3.C3: Graduate Catalog – Data Science Program).

In addition to the broad range of information provided electronically, the university utilizes many in-person events and activities to disseminate critical information about academic programs and requirements to prospective and new students. For example, both the graduate and undergraduate admissions offices host numerous events throughout the year, including Open Houses, Information Sessions, Day-in events, and Program Spotlights. Program materials are provided to prospective students at these events, including Hot

Sheets which provide details of admission requirements and time to completion (S3.C3: Hot Sheets Samples; S3.C3: Day-In Schedule Sample).

Academic Programming: Ensuring Effectiveness

Committed to regular assessment as critical to continuous improvement within major programs and the general education curriculum and in line with *Requirement of Affiliation 8*, Mercyhurst University has worked diligently over the last ten years to cultivate a culture of assessment. As detailed further in Chapter 7, academic departments and programs use a range of assessment tools to evaluate progress toward departmental goals and achievement of student learning outcomes. Through academic plans and curriculum maps, departments develop goals and learning outcomes, articulate the curricular trajectory for each program including designated performance levels, and establish ongoing program assessment through the five-year assessment cycle (S3.C8: Assessment Handbook).

As documented in the Assessment Handbook, faculty within each department also conduct annual departmental assessment of specific student learning outcomes. Each year, OIE reviews the assessment process and determines, based on several institutional factors, what the annual reporting structure will be. For example, prior iterations of reporting focused on quantitative results and action planning whereas more recent versions focus on departmental reflection and the use of results to ensure ongoing program effectiveness. Despite changes in the reporting format, this annual process allows departments to assess student learning outcomes and critically examine pedagogical practices for the purpose of program improvement. For example, during the transition to the REACH curriculum in 2016, many departments adjusted course content to align with learning objectives with the REACH curriculum while still meeting departmental goals and program learning outcomes (S3.C8: Program Change Application Samples).

Another opportunity for analysis is the Five-Year Self-Study, in which academic departments are required to reflect on assessment processes over the past four years within the larger context of faculty composition, departmental resources, and future goals. The Five-Year Self-Study process also provides an opportunity for departments to work closely with OIE and to ensure that an up-to-date curriculum map and assessment plan are in place (S3.C8: Five-Year Self Study Guide; S3.C8: Five-Year Self Study Samples).

Committing to Teaching Excellence: Faculty

Mercyhurst University is fortunate to have an assembly of highly skilled full-time, part-time, and contingent faculty dedicated to the mission of the university and to the design and delivery of rigorous student learning experiences, in line with *Requirement of Affiliation 15*. Critical to expectations of faculty is the university's unwavering commitment to teaching excellence as the hallmark of faculty quality.

Mercyhurst ensures that faculty are qualified for the positions that they hold both through ongoing evaluations, described below, as well as in the initial hiring process. Consistent with the university's commitment to academic excellence, the faculty hiring process is rigorous, inclusive, and linked to mission. Prospective faculty members are interviewed by departmental faculty representatives and administration, including, for full-time hires, the vice president for mission, and faculty from outside the hiring department, who represent the broader mission and core values that bind the Mercyhurst community. Within the hiring process, the department chair, dean, and members of the search committee work with the administration to certify that candidates possess the

necessary educational qualifications as outlined in the Faculty Handbook and human resources policies and to ensure that the expertise and content area requirements of a program are satisfied (S3.C2: Faculty Handbook p.20).

Using a variety of metrics including program and course enrollments, REACH course needs, and advising loads, the Office of Academic Affairs (OAA) and OIE review and ensure the sufficiency of faculty in the design and delivery of programmatic and general education curricula.

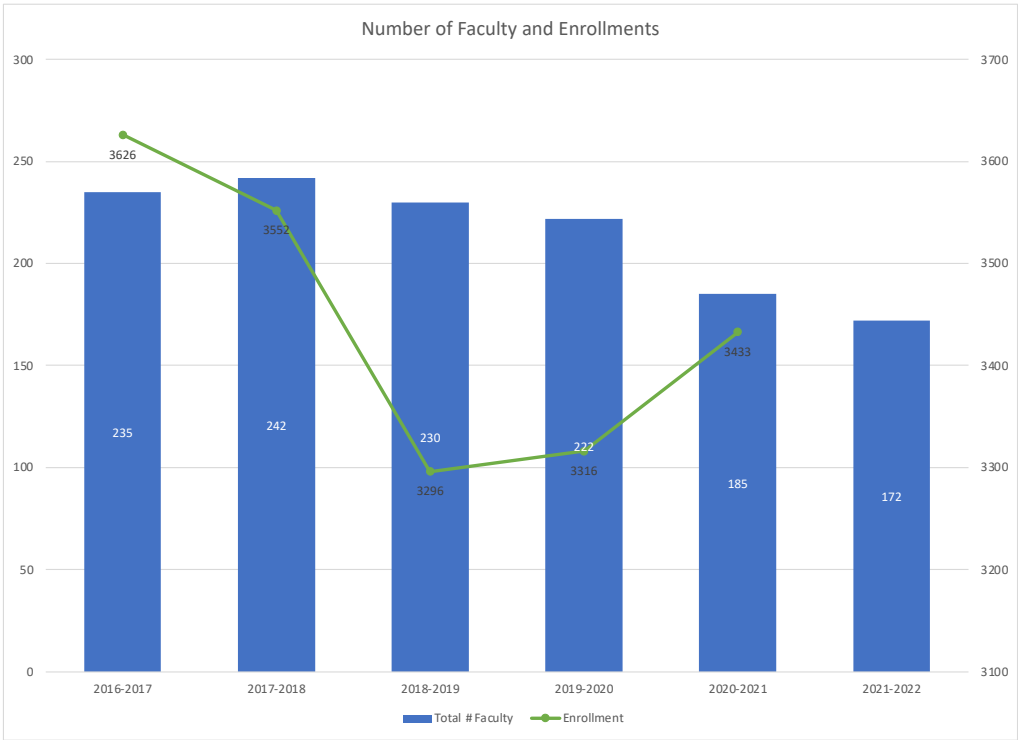


Figure 2 Faculty Sufficiency, as represented by total number of enrolled students and total number of faculty

In support of teaching excellence, the university provides a variety of opportunities and resources to encourage faculty professional growth and innovation. For example, faculty gather at the beginning of each academic year for Faculty Development Days, a joint initiative of OAA and the Faculty Development Committee (FDC) aimed at providing faculty members with necessary academic information and opportunities for professional development, such as the workshop on diversity and inclusion in the classroom conducted during the Fall 2021 Faculty Development Days (S3.C2: Faculty Development Days Schedule Samples). In addition, the Center for Teaching Excellence (CTE) plays a vital role in supporting teaching and learning. Notably, CTE has taken a highly active role in providing support for faculty during the ongoing pandemic (S3.C2: CTE Overview).

The university also provides faculty with opportunities for and encourages the pursuit of scholarly interests and research. As detailed in the Faculty Handbook, the university supports faculty research directly through university-funded research funds housed in the operating budgets of the four college deans (S3.C2: Faculty Handbook p.55).

Mercyhurst University has an articulated process for faculty evaluation that both supports faculty development and demonstrates the university’s ongoing commitment to teaching excellence consistent with the mission and Mercy tradition. In addition, regular classroom/teaching observations are a key component of faculty evaluation. The university maintains a standardized classroom observation form consistent with the demonstration of performance criteria as listed in the Faculty Handbook (S3.C2: Classroom Observation Form). Classroom observation criteria for high-quality instruction call for examples of student engagement, effective communication with students, effective teaching styles and strategies, and high-level content mastery and dissemination.

Recognizing the importance of teaching excellence and academic professionalism, processes exist for the promotion of both tenure-track and non-tenure track faculty to ensure the overall quality of the faculty. Section VI of the Faculty Handbook details the university’s tenure policies and procedures (S3.C2: Faculty Handbook p.67).

Cultivating an International Perspective

Study abroad at Mercyhurst has grown dramatically over the last ten years. Detailed on the university’s Hub site, study abroad at the university is facilitated through the Office of Study Abroad and overseen by the dean of global programs. Grounding the university’s growth and development in study abroad is the Faculty-Student Academic Travel (FSAT) program, which creates and facilitates affordable short-term, course-related programs in which students and faculty learn and travel together (S3.C5: Study Abroad Overview).

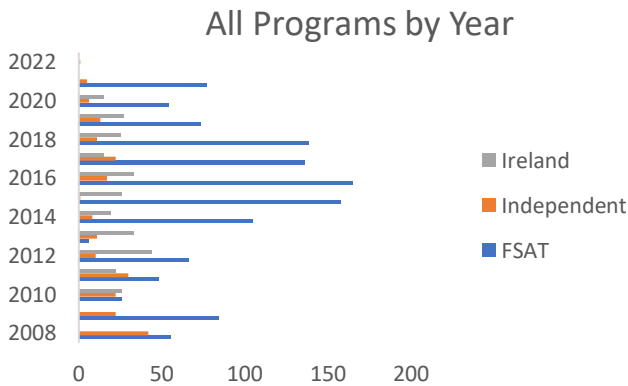


Figure 3 Study Abroad Participants, by Year

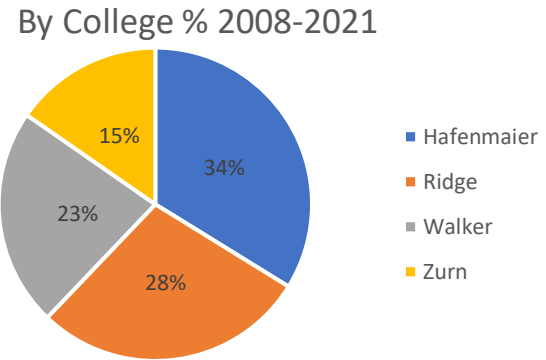


Figure 4 Study Abroad Participants, by College

The jewel of the university’s study abroad program is the Mercyhurst in Ireland program. Inaugurated in 2010, the Mercyhurst in Ireland program provides students and faculty the opportunity to live and learn together on-site in Dungarvan, County Waterford, Ireland, for eight weeks. Through the program, students complete regular Mercyhurst University courses applicable to general education curriculum requirements, as well as courses in the major programs represented by the faculty living onsite during a given term. During their stay, both students and faculty are integrated into the life and culture of a small city on the southeast coast of Ireland (S3.C5: Study Abroad Overview).

The university also offers robust opportunities for students seeking independent study abroad for academic terms or full academic years. Through nationally recognized affiliated providers, such as the American Institute for Foreign Study, Semester at Sea, and Cultural Experiences Abroad, the university facilitates independent study abroad for about three to five students each year.

Supporting the Student Learning Experience

The university provides a variety of resources that support the institution's programs and the academic progress of all students. Primary to these efforts are two dedicated departments under the direct supervision of the vice president for academic affairs: Academic Services and Support and the Office of Distance Learning (ODL). The placement of these offices within the academic structure of the university ensures that support for student learning is informed by and woven into academic planning and decision-making.

Essential to academic support is the university's robust student advising program. Upon enrolling, every undergraduate student is provided with both an academic advisor and an academic counselor. The academic advisor is typically a faculty member from the student's major program. In the case of undeclared students, experienced faculty members are selected to serve as advisors to guide students as they progress toward declaring a major and choosing an academic advisor in that major. The academic counselor from Academic Services and Support works closely with students to ensure satisfactory academic progress, provide guidance, and offer referrals for a variety of student needs, including tutoring, counseling, and other support services. Students are monitored by both the academic advisor and academic counselor through the Self-Service online platform, which allows real-time information to be shared on many aspects of student's academic progress, including attendance, early alert notifications, and performance (S3.C4: Student Planning Guide for Advisors).

Academic Services and Support is also essential in providing the information, resources, and referrals critical to academic success. Within this functional area, students have access at no additional charge to support resources such as the Writing Center, the Testing Center, and Tutoring. Additional details about these critical services are found in Chapter 6.

Also contributing to the success of students is ODL, that works with departments on the development of online/web courses and programs to ensure that students are provided with a consistent, well-supported online course experiences. Toward that end, all university courses instructed in an online format require approval through a formal online course development approval process. ODL also monitors the university's participation as a provider through the Online Consortium of Independent Colleges and Universities (OCICU) and approves student requests to complete coursework through OCICU (S3.C4: ODL Course Checklist; S3.C4: OCICU Course Application).

COVID-19

In response to the global pandemic, during spring semester (mid-March) 2020, academic operations at Mercyhurst University, including all in-person courses, abruptly transitioned to remote instruction (via Microsoft Teams and Blackboard) and remained remote through the summer for those programs offering summer semester/mini courses. Anticipating that this may have to be the case, the OAA lead a monumental effort to ensure that all courses and faculty were ready for a potential shift to virtual learning. Over three days in mid-

March, a team of 12 deans, associate provosts, academic support counselors, instructional designers, and IT professionals set up a resource room and spent more than 120 hours working one-on-one with instructors to be sure that the education experience remained both robust and student-centered. More than 60% of the faculty showed up to the resource room on at least one occasion, and many more received individual help from the team and from their faculty colleagues over the next week. Academic support services, including the Tutoring and Writing Centers, also quickly pivoted to provide necessary services to students in remote/online formats. Given the transition and the unprecedented challenges/stress brought about by the pandemic, students were given the choice of either a traditional letter grade or pass/fail status for each of their courses. Along the same line, no formal course/instructor evaluations (IDEA-SRI) were conducted in spring semester courses; however, departments did provide reflection as to the impact of the transition as part of the 2020 annual assessment process led by OIE (S3.C8: 2020 Annual Assessment Report Samples).

In preparation for the start of the fall semester 2020, the university developed and effectively implemented the Hurst Hybrid Model for academic course offerings. This model outlined different modes of content delivery (i.e., in-person, hybrid-A/B, and online) based upon course enrollment and physical space (classroom, laboratory, and/or studio) given the need for social distancing and provided flexibility between formats if/when cases of COVID-19 arose. Throughout the summer, numerous training sessions to support faculty with new classroom/teaching technologies, such as Zoom, Screencast-o-Matic, and video cameras, as well as a variety of pedagogical support, such as effective classroom management, flexible course design, and online assignments and grading were offered by CTE, many contributed by peer faculty members and recorded so that they could be shared and accessed at any time. The university operated within the Hurst Hybrid Model for program delivery of student learning experiences for the full academic year 2020-2021. Throughout the ongoing pandemic, the university has emphasized flexibility while maintaining robust and rigorous coursework and expectations for high-quality instruction to support the student learning experience.

Key Findings

- Policies and practices within academic affairs, such as including the vice president for mission in faculty hiring and submitting all new academic program proposals to the full Faculty Senate for review, demonstrate the university's commitment to shared governance in the spirit of One University, One Mission.
- Clear progress has been made in the university's approach to the general education curriculum; the REACH curriculum is grounded in a clear vision of student development that is easily articulated and achievable.
- The university demonstrates impressive commitment to and progress in the assessment of Mission integration through the outREACH initiative.
- The university's approach to academic program evaluation is comprehensive and systematic; through assessment plans, curriculum mapping, and five-year self-studies, academic departments are engaged in substantive assessment for continuous improvement.
- The university has made impressive progress in expanding global student learning opportunities through Mercyhurst in Ireland, as well as through the development of a substantive study abroad program, which includes the vibrant offerings with the course-connected, faculty-led FSAT Program and affiliate term- and semester-length programs. Grounded in clearly articulated student learning objectives, the

study abroad program, through its piloted assessment model, indicates a positive trajectory for the university in continuing to develop and implement student support services assessment.

- The university continues to demonstrate its commitment to teaching as core to the mission as evidenced by the strong presence of teaching effectiveness in faculty and course evaluations processes, faculty performance criteria, tenure and promotion, as well as in the availability of defined teaching support resources, such as CTE, ODL, and FDC.

Current Initiatives

- Under the new structure for OAA and the Deans Council, there has been a renewed focus on academic organization, efficiencies, planning, and policies. For example, the Deans have undertaken the following: reviewed and updated policies for both the graduate and postbaccalaureate programs to more effectively serve students; re-envisioned the contract major process to emphasize academic excellence and interdisciplinarity; reframed the *studies* programs for students who may otherwise struggle to complete specified degree programs to support retention and on-time graduation of students; and consolidated and systematized the faculty evaluation and credential-verification processes for all colleges. As part of this new framing, these *studies* programs will be assessed to review when and under what conditions students are using the degrees to graduation.
- OAA, committed to supporting faculty research, has revamped the process for granting significant course reduction or financial support for up to four faculty, each academic year beginning in 2022-2023. This is in addition to the faculty research funds available through the colleges. At the conclusion of the award period, faculty will be asked to report back on their progress as a result of this funding opportunity.

Opportunities for Improvement and Innovation

1. It is recommended that the university continue its progress toward implementing effective and sustainable assessment processes for the general education REACH curriculum, through which university-wide learning outcomes are assessed. Specifically, the indirect self-reported student learning should be augmented with even more robust information from the capstone programs.
2. While the university continues to evidence that it both values and supports faculty and student scholarship and research, it is recommended that the university review its policies in light of notable decreases in the availability of research-related funding and course release over the past several years and develop more consistent and systematic approaches to allocating funding and assessing both the processes for and outcomes from supporting faculty research and scholarship.

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Chapter 6: Standard IV- Support of the Student Experience

Across all educational experiences, settings, levels, and instructional modalities, the institution recruits and admits students whose interests, abilities, experiences, and goals are congruent with its mission and educational offerings. The institution commits to student retention, completion, and success through a coherent and effective support system sustained by qualified professionals, which enhances the quality of the learning environment, contributes to the educational experience, and fosters student success.

Overview

Mercyhurst University meets the requirements of Standard IV. A full description of the ways Mercyhurst University meets the six criteria and all applicable sub-criteria of Standard IV, as well as the *Requirements of Affiliation 8 and 9*, are presented throughout this chapter.

Inspired by the legacy of the Sisters of Mercy and guided by the university's mission, support for the student experience runs deep at Mercyhurst University. Descriptions of the university's support of the student experience team with examples of a deep concern for the well-being of students with special attention to building relationships between students and university faculty, staff, and administration. University areas from Admissions and Student Financial Services (SFS) through Student Life, Mission Integration, Academic Affairs, and Advancement all play a vital role in support of the student's success in integrating into the Mercyhurst community, in thriving in academics, in co-curricular pursuits and social acclimatization, and ultimately in realizing their goals as flourishing alumni in their chosen careers. In this way, Mercyhurst students are truly Lakers for Life.

Establishing the Foundation: New Lakers

Admissions and Enrollment

Commitment to the student experience begins long before a student steps on to the campus, as evidenced by the university's attention to and investment in efficient, transparent, and informative admission and enrollment processes. For example, over the past five years, the university's enrollment division has integrated a variety of Customer Relationship Management (CRM) software solutions to improve and expand the ways in which admissions professionals manage prospective students (S4.C1: Slate Communication Samples; S4.C1: Slate Student View Samples).

Recognizing that affordability and financial wellness are critical to student success, and in the spirit of the university's mission, the university is committed to student-centered admissions and enrollment processes that include prompt dissemination of financial aid information. Thus, the university provides accurate and comprehensive information regarding expenses, financial aid, scholarships, grants, loans, repayment, and refunds. The admissions site on the university's webpage provides financial aid information links tailored to associate, undergraduate, and graduate degree applications (S4.C1: Admissions Website). Each financial aid landing page provides information about tuition and fees, financial aid and scholarships, and value and affordability, as well as links to useful resources. In addition, prior to admission, students receive comprehensive financial aid documents, including a financial aid offer letter, one of a variety of mechanisms utilized by the

university to communicate all aspects of financial literacy relating to potential funding (S4.C1: Financial Aid Document Samples).

Once enrolled, students have access to the Financial Aid Student Hub site with comprehensive written instructions and guidance for common issues students face in paying for higher education (S4.C1: Financial Aid Hub Site). SFS focuses on outreach through a communication plan designed to remind students and their families of key dates and obligations throughout the year (S4.C1: Student Financial Services Communication Samples).

As with SFS, the Office of Admissions is committed to student-centered, responsive, and information-rich processes in support of the student experience. Admissions staff are responsible for reviewing prospective student applications to ensure that students are prepared to study at the academic level to which they are applying, including certification, associate, baccalaureate and graduate levels. Committed to the holistic review of applications, the university accepts direct applications and participates in the Common Application system. For undergraduate admissions, the application process includes academic transcripts, a writing sample, and, in some cases, a letter of recommendation. At the graduate level, additional program-specific items may be required in addition to the above materials, such as an in-person interview (S4.C1: Undergraduate Admissions Requirements; S4.C1: Graduate Admissions Requirements; S4.C1: Secondary Education Program Admissions Requirements). All admissions processes are committed to ongoing quality review and the use of data in decision making to improve operations. For example, the decision to move to a test-optional application and allow self-submission of transcripts was made to provide greater flexibility to students, which proved invaluable when the global pandemic compromised student access to these processes. Moreover, data indicated that not only could application completion rates be improved, but also that the student experience would be more positive if the time between application submission to acceptance were reduced. As another example, the university invested in a recruiting management platform that allows for communication with students via text messaging, which they have indicated is their preferred method of receiving important updates.

Orientation and Welcome Week

In further support of the student experience, the university is committed to providing resources and experiences that facilitate the integration of new Lakers into campus life. To that purpose, the university offers a robust summer orientation experience which includes information sessions for students and their families on a range of topics, including:

- academics, including sharing first semester course schedules and opportunities to meet with departmental representatives, as well as information about academic supports offered on campus;
- available resources, such as information about financial aid, information technology, and using Mercyhurst software systems;
- and student life, including the counseling and health centers, Title IX, and residence life (S4.C1: Orientation Overview).

In addition to summer orientation sessions, new traditional-aged students also participate in the Mercyhurst University Welcome Week. Under the direction of the Campus Involvement Center (CIC), Welcome Week includes a wide variety of speakers and events aimed at immersing students in campus culture and introducing the university's mission identity (S4.C1: Welcome Week Schedule).

iMU

Rounding out a discussion of the university's commitment to ensuring the quality of the student experience for new Lakers is the iMU first-year course sequence. Detailed more fully in Chapter 5, iMU provides a foundation for new traditional-aged students (S4.C1: iMU Overview).

Supporting Academic Success: Learning Lakers

As detailed in Chapter 5 and in line with *Requirements of Affiliation 9 and 10*, commitment to and support for student academic success through quality general education and academic programming is the university's highest priority. Through high quality academic services, which include a robust commitment to policies and procedures designed to foster persistence and completion, academic advising, the effective leveraging of technology to foster communication on academic progress, and targeted programming to support learning differences, the university strives to create an environment in which Laker learners can thrive.

Academic Affairs

The Office of Academic Affairs (OAA) oversees all campus departments that are directly related to academics, both within traditional programming and in support of student learning. Such departments include the Registrar's Office, Office of Distance Learning (ODL), Academic Services and Support, Learning Differences, and Career Development. While each of these departments is individually charged with enacting a set of policies and procedures designed to support the student experience, those policies and procedures are set and periodically reviewed by OAA.

The Registrar's Office, as the primary policy management unit for academics, is a critical student services area. The Registrar's Office maintains and enhances student services as they relate to policies and procedures regarding credits awarded to students (S4.C2: Change of Major Form, S4.C2: Pass-Fail Declaration). The Registrar's Office is also charged with maintaining student academic records (S4.C3: Records Maintenance Policy).

The evaluation of transfer and advanced standing credit is another example of an improvement that fosters collaboration across offices to support students. The university keeps a record of institutional data that reflects coursework equivalency as approved by academic department chairs. This information is reviewed on a rotating basis by the records manager in the Registrar's Office to ensure the information is current. This information is also made available to transfer admissions counselors, who are tasked with reviewing official transcripts from the transfer institution and outlining transfer equivalencies on a student's program evaluation on Self-Service. Policies for evaluation and acceptance of credits either through transfer, experiential learning, prior non-academic learning, and competency-based assessments are outlined in each of the university catalogs (S4.C2: Undergraduate Catalog – Transfer Credits; S4.C2: Graduate Catalog - Transfer Credits; S4.C2: Transfer Credit Equivalency Example). In addition to traditional transfer credits, the university maintains a system for reviewing and awarding Credit for Life Experience (CLE) that includes experiential and prior learning. The CLE process is a portfolio-based process that allows students to submit documentation supporting mastery of course learning outcomes that is reviewed by the associated academic department. The process begins when a department proposes a course that will count for CLE and submits information about the portfolio requirements and assessment rubric. Once approved by OAA, students may submit CLE documentation at any point during their enrollment (S4.C2: Credit for Life Experience Application).

Academic Support

The services associated with the Office of Academic Support (OAS) afford support for students at all levels of preparedness, including appropriate identification and delivery of remediation opportunities, ensuring ongoing student success, and providing services to further enhance the education of excellent students across campus.

Freshman Scheduling

A joint initiative between OAS and the Office of Institutional Effectiveness (OIE), the freshman registration process ensures that incoming students are placed in first-semester courses that meet programmatic needs while enabling students to explore areas of interest. Three pieces of information are used to build the freshmen schedules: a department-created list of required major courses for students during their first semester, a preferences survey that identifies areas of interest for incoming students, and data from the student's application including high school transcripts and submitted SAT/ACT scores. Importantly, the latter piece of information helps to ensure that students are enrolled in the appropriate first semester college writing course. Taken as a whole, the freshman registration initiative allows for the creation of more appropriate schedules that help students transition to college coursework and meet academic goals (S4.C1: Freshman Scheduling Overview). Similarly, OAS provides targeted support to students unsure of which major to declare through Exploratory Student programming, which includes personal counseling as well as numerous events, including career fairs, major/minor fairs, and job shadowing (S4.C1: Exploratory Student Programming).

Accessibility Services

Mercyhurst has a robust suite of accessibility services that are guided by the Americans with Disabilities Act (ADA) staff to ensure that students with documented diagnoses have access to appropriate accommodations in their academic courses (S4.C1: Accessibility Services Overview; S4.C1: ADA Accommodations Application; S4.C1: Accommodation Notification Sample). In addition to ADA compliance, OAS staff works closely with students who self-identify as needing additional support. For example, the university offers a fee-based program to students and families, the Academic Advantage Program, that provides a variety of services and support throughout the academic year (S4.C1: Academic Advantage Program Brochure).

Testing, Tutoring, and Writing Centers

In addition to providing direct student support through advising and resources for learning differences, OAS sponsors critical services to support student academic success throughout the student's matriculation, including the Testing, Tutoring, and Writing Centers. Available to all students both in-person and those in web courses, each of these centers supports students, at no cost, offering services such as alternative exam arrangements, one-on-one and group tutoring, and support for honing writing communication skills (S4.C1: Testing/Tutoring/Writing Center Overview).

Progress Monitoring

In addition to providing services through dual advising for new students as described in Chapter 5, academic support staff counselors monitor academic progress for all students each semester through Self-Service, one of several tools utilized by the university within the Student Information System, Ellucian Colleague. Self-Service, available to students, academic advisors, and student support counselors, provides access to unofficial transcripts, enables students to plan and register for coursework, facilitates direct communication among

stakeholders, documents enrollment actions, and confirms that progress is made toward meeting degree requirements (S4.C1: Student Planning Guide for Advisors; S4.C1: #15toFinish Poster).

Honors and Prestigious Awards

While supporting struggling students is vital and particularly consonant with mission, the university also recognizes the importance of providing opportunities for excellent students to continue to grow and develop as learners and scholars. The Mercyhurst Honors Program plays an important role in supporting those students, offering an enriched intellectual collegiate experience, both in and out of the classroom, including special honors-level coursework, participation in an engaging community of like-minded peers, and opportunities to enhance leadership and professional skills (S4.C1: Honors Program Overview). In addition, the Prestigious Awards Program provides students with assistance in writing competitive applications for prestigious national and international awards in contemporary undergraduate and graduate scholarship, such as the Boren Scholarship, the Goldwater Scholarship, the Fulbright Scholarship, and the Marshall Scholarship. The success of the Prestigious Awards program is evident not only in that it produced Fulbright Scholarship Winners in 2018 and 2020, but more importantly in the way the Prestigious Awards Program allows faculty and staff to identify excellent students early and help them work toward applying for these prestigious scholarships, building on the faculty-student bond that defines the Mercyhurst education (S4.C1: Prestigious Awards Program Overview).

The AIM Program

The Autism Initiative at Mercyhurst (AIM) offers support and special career readiness opportunities for academically successful students on the autism spectrum. The mission of AIM is to facilitate and support the successful adjustment and progression of college students on the autism spectrum in all domains of college life, thereby broadening vocational opportunities and enhancing social and community engagement. The AIM program strives to accentuate each student's abilities within the academic, social, emotional, and independent living domains while building new skills in domains in which the student may be deficient. The goal of the program is to maximize the potential for student success by introducing students to academic expectations and campus culture in a supportive environment prior to full enrollment in the fall semester (S4.C1: AIM Program Brochure). As of Spring 2020, 67% of graduates are currently in meaningful employment, defined as work the student prepared for academically and where the students feels that they are making a significant impact in their career and society (this can include graduate school). The Office for National Statistics has published 2021 data that shows just 22% of autistic adults are in any kind of employment.

Extending the mission of the AIM program is CREATE, a college-readiness program for high school juniors and seniors on the autism spectrum who are deciding whether a university education is the right choice. The CREATE program allows students to take up to six college credits in the summer, but more importantly provides them with an opportunity to develop the foundational skills for success in their first semester at college. These opportunities include engaging with college life by living in a residential setting, eating in dining halls, and receiving individualized guidance as they develop social and study skills.

Mercyhurst Library

The Hammermill Library embodies the university mission as well as the dedication to supporting students as learners with a goal of "enriching the Mercyhurst education process by cultivating an information rich environment and develop life-long learners and moral consumers of information." In addition to the standard

services expected of a university library such as access to books, journals, and databases, both in-house and through interlibrary loan, the Hammermill Library also focuses on providing both one-on-one and classroom-based sessions on information literacy (S4.C1: Library Overview).

Fostering Engagement: Living Laker

As illustrated above, the university provides substantive academic support for Laker learners both in and outside of the classroom. Recognizing, however, that the classroom is only part of the student experience, the university embraces a holistic approach to supporting student success for Lakers beyond the classroom. From the day new students arrive on campus until the day they graduate, student life, student services, and academic staff work together to develop, implement, and maintain programs, events, and resources to enhance the student experience and foster engagement. The quality and efficacy of these efforts are grounded in a university-wide commitment to the belief that Living Laker is an academic, social, and spiritual journey.

Residence Life and Student Conduct

Mercyhurst University is primarily a residential campus. The Office of Residence Life and Student Conduct strives to provide a living environment that enables each student to develop holistically through educational opportunities. With so many of its students living in university housing, including freshman residence halls, a dedicated residence hall option for sophomore students, and a variety of apartment and townhouse settings, the university recognizes the importance of supporting the student experience outside of the traditional classroom.

Central to this commitment is the Office of Residence Life, which is charged with providing a residential environment that fosters student learning and well-being. Guided by an annually updated Student Handbook, the Office of Residence Life creates programming and establishes policies and protocols to encourage students to participate as active members of the university's community, while maintaining acceptable standards of behavior and respecting the rights, privileges, and property of others (S4.C4: Student Handbook p.43). The Residence Life development model, designed in 2018 and implemented in 2019, is based on the acronym of A.N.C.H.O.R.S. and rooted in the Core Values of Mercyhurst University. There are seven pillars that guide program offerings:

Academic and Professional Development (Intellectually Creative);
Normalizing Diversity and Inclusion (Compassionately Hospitable);
Civic Engagement and Global Responsibility (Globally Responsible);
Health and Wellness (Reflectively Aware);
Ongoing Self-Exploration (Reflectively Aware);
Respect and Consent (Compassionately Hospitable); and
Socialization and Community Building (Socially Merciful).

In addition, Residence Life provides ongoing staff training to ensure quality. For example, students who apply for and are selected to be Residence Assistants participate in annual training to nurture their skills as leaders, role models, mediators, and conduits for discipline on the campus (S4.C4: RA Program Overview; S4.C4: RA Programming Example; S4.C6: RA Training Survey Results).

Moreover, the Mercyhurst Student Conduct System is “intended to maintain the integrity of the university’s mission and core values while fostering the ethical maturation of the student,” with a focus on “good judgment, responsible social stewardship, and concern for an improved quality of life for the whole community.” As such, the Conduct System including the staff, panels, administrative and board reviews, and consequences are designed to be developmental for students and not overly punitive (S4.C4: Student Conduct Overview).

Campus Involvement

Overseen by an executive director, CIC fosters student success by providing opportunities to engage in social, leadership, and experiential activities. CIC works to connect students to Mercyhurst traditions, as well as to provide involvement opportunities, foster intellectual development, and mentor students through self-awareness. In these efforts, CIC functions as a hub for activities and communication for student engagement, including the Mercyhurst Student Government (MSG), Recognized Student Clubs and Organizations (RSCO), Student Activities Council (SAC), and the Multicultural Activities Council (MAC). Through the CIC, students have access to timely information and notifications about campus activities via the Weekender Hub page, which is updated frequently and available to students online. CIC programs are assessed to determine how well they are serving the needs of students through a variety of indicators such as student surveys, event participation, and student engagement in RSCOs (S4.C4: Campus Involvement Overview).

In addition, through CIC, the university provides students with opportunities for social growth and personal success through focused initiatives, such as the Leadership Development Program (LDP), which is a multi-level, non-credited program designed to recognize and develop the leadership potential of undergraduate students. Students who complete the program rate their ability to demonstrate leadership skills through an exit survey; results from the past few years indicate that students experience significant growth in their leadership skills and abilities as a result of the program (S4.C4: Leadership Development Program Overview).

Wellness

The university demonstrates a particular concern with physical and mental health and wellness, as evidenced in the 2021-2024 Strategic Plan which commits to action and investment for the “holistic health and wellness of students.” For example, the university offers support for students through the Student Outreach Committee (SOC), which is a referral system used to provide wrap-around support for students who may be struggling socially, emotionally, and/or academically. This committee is charged with ensuring that at-risk students receive outreach and access to whatever support they may require. Established in 2009 in response to a documented increase in the rates of anxiety and depression among students, including suicidal ideation and attempts, SOC provides a crucial intersection that links reported concerns about student well-being with the university resources available to address those concerns and the students themselves (S4.C1: Student Outreach Committee Overview).

As with SOC, many of the unique ways through which the university supports wellness as central to the student experience are collaborative efforts meant to yield explicit and effective outcomes. For example, recent planning for improved student health outcomes resulted in three multi-departmental teams: a coordinated community response team for interpersonal violence, sexual assault prevention and education; an athletics and counseling center for wellness and mental health; and a measles vaccine action team. As another example, departments in the student life area collaborated on an approach to offering dining, transportation, recreation,

and activities during university break periods for students unable to leave campus at those times (S4.C1: Campus Wellness Services Overview).

Finally, recognizing that “Living Laker” can mean many things to different students, the university fosters wellness through its efforts to advance diversity and inclusion as values consistent with the mission. Among these efforts, as described in *Creating a Climate of Respect*, among these efforts, the university supports:

- programming and pastoral presence as an essential support for students who might otherwise feel marginalized on campus;
- the LGBTQIA Allies program to promote acceptance of all students across the range of sexuality and gender diversities;
- opportunities to engage deeply with the outside community through service; and
- support for those struggling financially through the Mercy Market.

In the spirit of the Mercy Mission, all services are offered in a way that maintains the dignity of the individual and recognizes that students cannot achieve their educational goals without first having basic needs fulfilled.

Athletics

The university recognizes that with nearly 32% of the undergraduate students identifying as student-athletes, the need for quality student support for students striving to balance athletic and academic responsibilities is imperative. In addition to club sports, the university intercollegiate athletics program is comprised of 25 varsity sports, with the Lakers fielding teams in 13 women’s sports and 12 men’s sports. As detailed on the Mercyhurst University Athletic Website, the athletics program is overseen by an executive director and supported by eight administrative positions, including the associate director, the assistant athletic director for student health and wellness, and a designated compliance assistant (S4.C4: Athletics Organizational Chart). As part of the overall university structure, the athletic department is regulated by the same policies and procedures as all other departments at the institution, including participation in standard university budgeting processes, compliance with all human resources policies, and maintaining consistent supports and services for student athletes (S4.C4: Athletics Handbook).

The athletics program demonstrates impressive success both in student GPA and degree completion rates. Moreover, the university is committed to a holistic approach to supporting student-athlete personal development. Much of this success can be attributed to the level of support received from not only the coaching staff, but also the numerous athletic administrators and staff. A key component of this support is the position of Assistant Athletic Director for Health and Wellness. As a health and wellness advocate, the director works with coaches and athletic trainers to ensure that student-athlete mental, physical, and nutritional needs are essential considerations in all aspects of athletic programming, from conditioning to training to scheduling and education.

As another example of support for developing the whole person, athletic teams engage with the university’s core values as ambassadors of service through their efforts in community service, such as:

- the hockey program is involved in the Gliding Stars program; the softball team works with the Sports Medicine department each year to sponsor a 5K race to benefit a local charity;
- the volleyball team sponsors BINGO with veterans at the VA hospital;
- football players volunteer to read to elementary school children; and

- the baseball team works with three St. Luke's Elementary School events annually to assist with fundraising for school athletics.

Creating Connections: Lakers for Life

As demonstrated above, Mercyhurst University is committed to providing substantive support for students from recruitment and admission to the early days of integration to the wide range of student experiences through the years of matriculation and graduation. Essential to this support is the recognition that the Laker experience is one based on relationships: relationships with the faculty who teach; connections with the administrators who serve; and extraordinary bonds with fellow students who learn and grow together. In this spirit, the university is committed to providing support for students well beyond the years they spend on campus. The goal is to forge Lakers for Life: students who upon graduation live as examples of and proud ambassadors for the university mission and core values. The Office of Advancement and Alumni Relations and the Career Development Center (CDC) play perhaps the most prominent roles in providing support for Lakers for Life. Both offices help students create connections inside and outside of the gates.

CDC supports students throughout their matriculation with the goal of post-completion placement. CDC prepares students for their professional lives throughout their academic experience by providing career exploration and job search links, sponsoring job and graduate school fairs, and facilitating student experiential learning opportunities. In addition, CDC offers free services to all Mercyhurst alumni and fosters relationships between alumni and current students through a variety of programs (S4.C1: Career Development Center Overview).

Prior to and after a student's degree completion, the Office of Advancement and Alumni Relations fosters relationships that encourage the development of connections leading to lifetime engagement with the university. For example, students are provided opportunities to play key roles on the senior gift committee, generating funds for a scholarship or project approved by their peers, and introducing those students to the concept of philanthropy and giving back to the university. Alumni are connected through an alumni newsletter quarterly to keep them abreast of current events on campus. In addition to an electronic newsletter, the *Mercyhurst Magazine* is published several times each year, featuring in-depth articles on university events, accomplishments, and programs, as well as alumni updates for graduates going back decades. The annual university homecoming and alumni weekend events bring alumni back to campus to engage with each other, restore connections, and nurture the university community. Moreover, the university's commitment to Lakers for Life goes far beyond contact and opportunities for alumni to give back. Through programs which provide advanced education to alumni at discounted rates, such as the Organizational Leadership Graduate Program Ten Courses for \$10,000 program, the university assists alumni in up-skilling in response to an evolving employment market and in critical career transitions, for example, the employment challenges presented by global pandemic (S4.C1: Alumni Communication Samples).

COVID-19

One example of how university structures and events were adapted because of the COVID-19 pandemic involves the New Student Orientation process. The pandemic required the orientation team, composed of individuals from academic support, marketing, admissions and student life, to transition the traditional orientation program to a completely online program. Many of the offices and departments involved in orientation created videos,

hot sheets, and Laker Live Chats to share important information with incoming students. Microsoft Teams sessions were hosted by departments to allow students and families to interact with employees and administrators on various topics such as academic accommodations or getting involved in campus life. Over 80 Laker Live Chats occurred in the summer of 2020. Academic advising sessions took place virtually between incoming students, faculty academic program representatives, and/or academic support counselors.

In the summer of 2021, when pandemic restrictions eased, the university recognized the value of both live and virtual contact with new students and launched a hybrid approach to orientation known as Laker Launch Days. Laker Launch Days are not mandatory, but they allow students an opportunity to be on campus and learn about the various student services. At these events, each academic college dean makes a presentation to the incoming declared majors in that college, and faculty members attend to interact with students and answer questions. During these sessions, students also review their fall academic schedules and learn how to schedule individualized academic support counseling meetings. The hybrid approach also allows for Laker Live Chats for students who choose to participate virtually. Through the orientation process, staff representing key student service areas collaborate to ensure that students are fully supported during the process of first integration into campus life.

Key Findings

- The university clearly demonstrates a deep respect for the total student experience by developing a university-wide “Lakers for Life” approach, coordinating efforts at recruiting, onboarding, and supporting students through their matriculation and beyond.
- The university has successfully invested in and made use of information technology to enrich the student experience. Tools, such as the customer relationship management system Slate, foster open, timely, and effective communication between potential students, actual students, and alumni with various offices ranging from Admissions, Student Life, Academic Services and Support, SFS, to Alumni Relations.

Current Initiatives

- To improve both the quantity and quality of information that the university has about student outcomes, a robust First Destination Survey process was engaged. Through this multiphasic effort, the university has been able to gather more useful data regarding what a student does after graduation.

Opportunities for Improvement and Innovation:

1. It is recommended that the university consider how additional resources, particularly online options, could facilitate more efficient tracking and communication with graduates.
2. It is recommended that the university build on the progress made to date in student services assessment, providing training and resources necessary to assist units in targeting areas for improvement in collecting data, interpreting assessment outcomes, and operationalizing them.

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Chapter 7: Standard V – Educational Effectiveness Assessment

Assessment of student learning and achievement demonstrates that the institution's students have accomplished educational goals consistent with their program of study, degree level, the institution's mission, and appropriate expectations for institutions of higher education.

Overview

Mercyhurst University meets the requirements of Standard V. A full description of the ways Mercyhurst University meets the five criteria and all applicable sub-criteria of Standard V, as well as the *Requirements of Affiliation 8, 9, 10, and 15*, are presented throughout this chapter.

A comprehensive assessment program provides clearly stated and appropriate goals aligned with the institution's stated mission. Mercyhurst has built a widespread and ongoing assessment practice of educational effectiveness that supports the goal of developing student success and academic excellence. Central to this purpose is the university's faculty, who oversee its academic programs and maintain a commitment to discipline, pedagogy, and student learning outcomes. Throughout the university, faculty and staff work in tandem to build and improve the university's understanding of student learning to achieve academic success through assessment, programing opportunities and services, and scholarship efforts.

A transformative approach to assessment has occurred at the university since the last self-study. From the university's mission, through department learning objectives and outcomes, to the academic support initiatives, a substantive shift has occurred that has produced a thoughtful and methodical approach to assessment. Use of assessment to improve curriculum and pedagogy has become a fully integrated part of faculty work from the use of information to improve individual instruction and course delivery to the design of new courses and programs. Throughout the process, the information gained through assessment allows faculty and departments to make informed instructional decisions to improve the academic experience and promote students' achievement of learning outcomes.

Supporting Assessment

Over the past five years, Mercyhurst University has operationalized institution-wide assessment of student learning and achievement. Critical to this process has been systematic processes for assessing the assessment, resources and professional development opportunities for faculty and staff to gain knowledge and skills in improving assessment and institutional effectiveness, and the creation of a campus office specifically charged with overseeing assessment activities. In 2016, the university consolidated its academic assessment operations within the Office of Institutional Effectiveness (OIE). Funded as a department within the Office of Academic Affairs (OAA), OIE supports the mission, values, and strategic goals of the university by providing internal and external constituents with timely and reliable information regarding the institution's operations and performance. OIE supports academic and administrative departments in the collection, use, and reporting of timely, accurate, and actionable information to inform decision making at the university, in line with *Requirement of Affiliation 8*. As part of its operations, OIE functions to:

- assess and document the university's progress in achieving its short- and long-term strategic goals and effectively communicate accomplishments to its various constituencies;
- meet the data reporting requirements of outside entities;
- support efforts to ensure that the university complies with all applicable rules, regulations and laws;
- maintain information systems that enable the university's academic and administrative leadership to effectively monitor assessment results.

OIE coordinates regularly with departments to ensure that assessment processes are both effective and efficient. Specific examples of OIE support for efforts to improve educational effectiveness through professional development activities related to assessment include the Assessment Handbook, the Assessment and Accreditation Hub page, and the Assessment Institute. The Assessment Handbook provides comprehensive information on academic assessment processes at the university, including planning, development, and implementation of assessment processes such as annual assessment reports and five-year self-studies, as well as timelines and schedules (S5.C3: Assessment Handbook). The Assessment Handbook is made available to stakeholders through the Assessment and Accreditation Hub site (S5.C3: Assessment Hub site). Similarly, *The Loop*, a bi-monthly newsletter introduced in early 2021, offers resources, highlights examples of good assessment practice on campus, and updates faculty and staff on any changes to assessment policies or processes (S5.C3: Assessment Newsletter Samples). In addition, targeted assessment support is provided to academic departments during OIE's annual Assessment Institute. The Assessment Institute includes an informational presentation from the assessment coordinator and breakout sessions in which faculty work collaboratively to develop a deliverable as assigned by OIE (S5.C3: Assessment Institute Overview). In addition to online resources and the Assessment Institute, OIE, through its designated assessment coordinator, sponsors individual meetings with department chairs to review assessment plans and brainstorm solutions to any assessment challenges reported by faculty.

As demonstrated below, Mercyhurst University can evidence significant progress both in providing the necessary support and resources required to ensure quality assessment information and in creating pathways to ensure that assessment information informs decision making.

Framing Curricular Outcomes

Mercyhurst University has defined a set of educational outcomes at the institutional, programmatic, and course levels that are intertwined with the university mission and core values. These encompass broad and comprehensive outcomes such as those found within mission itself to more granular course learning outcomes such as those found within course syllabi.

At the institution level, the primacy of the mission, vision statement, and core values in all aspects of university operations is explicit in the university's clear commitment to a consistent set of educational outcomes that are reflected within and reinforced by the educational experience. This is evidenced by the direct connections between the university-wide learning outcomes and the mission and core values of the institution. For example, the institutional learning outcome for *Civic Engagement and Intercultural Skills* can be directly connected to the core values of creating a *Socially Merciful* and *Compassionately Hospitable* student. Similarly, the institutional goals targeted in the 2021-2024 Strategic Plan, "Mission Inspired. Future Ready.," are organized around the categories of the university's core values (S5.C1: 2021-2024 Strategic Plan). For example, the goal of being

“Intellectually Creative” frames initiatives that reaffirm the centrality of the liberal arts, seeks to ensure high quality programming in both academics and student life, and prioritizes the student experience and student success as critical to meeting the mission mandate.

Narrowing from institutional to program level, the mission, vision, and core values provide the foundation for each program’s educational outcomes. For example, the department mission for the undergraduate business program statement states, “Graduates will embrace Mercyhurst’s core values of respect and tolerance for people and their ideas, and dignity in the treatment of all workers” and embrace “a collaborative approach to learning.” These statements correlate with the university’s mission which highlights “an appreciation for the dignity of work” and grounds the education enterprise “in the strength of its student-faculty bonds.” Similarly, the mission statement for the graduate program in secondary education states that “students in this program demonstrate strong pedagogical skills, leadership and service to others throughout the program,” which correlates with the university mission’s “appreciation for the dignity of work and a commitment to serving others” (S5.C1: Undergraduate Catalog – Business Accounting; S5.C1: Graduate Catalog – Teaching Excellence).

At the course level, these outcomes drive student learning, as evidenced through course syllabi. For example, in an accounting course, the syllabus details the departmental student learning outcomes as well as course-specific objectives with the business core curriculum that include working in teams and the importance of oral and written communication skills (S5.C1: Accounting Syllabus Sample).

Implementing Systematic Educational Outcomes Assessment

Mercyhurst University is committed to developing and implementing substantive and effectively managed processes leading to meaningful educational assessment, in line with *Requirement of Affiliation 9*. Accordingly, the university strives for continuous improvement through a process whereby faculty define curricular outcomes and ensure high standards in the validity of assessments to determine whether students are achieving those outcomes. Faculty within the individual academic programs drive this process and are supported in doing so by OIE and in line with *Requirement of Affiliation 15* (S5.C2: Assessment Handbook).

Each academic department at Mercyhurst is required to have a current assessment plan and curriculum map on file with OIE. Department and program mission statements serve as a bridge between the university’s mission and the concrete outcomes and specific field knowledge within the department’s assessment plan. Grounded in that mission, each assessment plan articulates departmental learning outcomes, identifies which courses and with what assignments/activities the outcomes will be assessed, determines how often the outcomes will be assessed, and designates who will be responsible for collecting, analyzing, and communicating assessment results. Department assessment plans and curriculum maps are updated as needed with assistance from OIE. Assessment activities within academic departments are reported to OIE in two formats: annual assessment reports and five-year self-studies (S5.C2: Assessment Plan Samples; S5.C2: Curriculum Map Samples).

One example of continuous improvement through assessment can be found in the assessment process itself. To streamline the annual reporting process and make it more meaningful for departments, in 2019, OIE replaced the annual report matrix with a narrative format. In this new process, faculty reported what learning outcomes had been assessed during the 2018-2019 academic year, what evidence for student learning had been collected, and what questions faculty had about their students going forward. After the forms were submitted, the

assessment coordinator met with department chairs individually to discuss departments' assessment efforts, answer questions, and offer guidance. These meetings proved crucial to providing faculty with the meaningful feedback that was missing from the previous annual reporting process (S5.C2: 2019 Annual Assessment Report Samples). A change in process was also necessitated by the COVID-19 pandemic, wherein OIE created a more reflective assessment reporting format to accommodate the sudden shift to remote learning. Using this reflective model, departments were able to identify the learning outcomes, course policies, and assignments that were most beneficial to their students and most important for their programs, information that they can use to better their assessments moving forward (S5.C2: 2020 Annual Assessment Report Samples; S5.C2: Assessment Growth Example).

Building on the clear success of the reflection-based model of annual reporting, the current annual assessment reports center on the use of assessment results. Departments are asked to describe changes that led to overall improvement, for example, in courses through adjusting content delivery strategies or in programs through sequencing of courses and material. By shifting the focus of assessment reporting to one critical aspect of the assessment cycle, faculty can embrace the meaningful use of assessment data, which ultimately provides a more robust description of the full assessment cycle. As opposed to the limiting nature of the standardized spreadsheet format previous used that inhibited reflection and improvement, the narrative nature of current reporting promotes more effective sharing of information about programs and their assessment processes and results (S5.C2: 2021 Annual Assessment Report Samples).

In addition to annual assessment reports, each academic program completes a five-year self-study (S5.C2: Assessment Handbook). As detailed in the Assessment Handbook, self-studies provide an analysis of a department's overall functioning, including components such as:

- the mission statement and educational objectives for the program, as well as current trends within the larger discipline;
- a profile of program faculty and students, including a summary of department resources and analysis of data provided by OIE about student enrollment, graduation rates, and alumni satisfaction, when available (S5.C2: Departmental Data for 5-Year Self Studies);
- an overview of student learning outcomes as assessed over the previous five years, critically examined to determine whether the outcomes were met;
- a comprehensive proposal for the next five years that is based on findings from the self-study, centered on student achievement and continuous improvement, and that includes updates to the curriculum maps and assessment plans, as necessary (S5.C2: 5-Year Self-Study Samples).

Another example of the university's commitment to developing effective assessment processes can be found in systematic assessments of student learning beyond the classroom. As detailed in Chapter 3, the outREACH initiative is a hallmark of the general education curriculum that operationalizes the university mission commitments with particular focus on assessing understanding of, appreciation for, and application of diversity, community, and service to others (S5.C2: outREACH Overview). As another example of how the university evaluates experiential learning requirements, pre-licensure nursing students are evaluated weekly during their clinical rotations using the Nursing Clinical Evaluation Form, which is now part of the electronic portfolio for all nursing students on clinical rotations. These formative and summative assessment forms, as well as others like

them, demonstrate that organized and systematic assessment of outcomes are occurring in settings outside the traditional classroom (S5.C3: Nursing Clinical Evaluation Form).

The university demonstrates its commitment to assessment by continually improving the regular collection and evaluation of critical data; for example, post-graduation surveys and licensing data are used to track and identify student professional success after degree completion (S5.C3: First Destination Survey Overview). Placement information is shared with departments to use as part of their ongoing program evaluation. This information also guides the services provided by the Career Development Center (CDC). As another example, professional licensure exam data is gathered for several programs including the physician assistant program. Per the PA accrediting body, licensure pass rates above a set benchmark provide evidence of successful preparation and are used by the department to make targeted curricular improvements based on calculated correlations (S5.C3: Physician Assistant Placement Rates).

Harnessing Assessment Information

As the examples discussed above show, Mercyhurst University demonstrates a substantive commitment to developing systematic assessments of educational outcomes. Moreover, the university frames these strategies as critical means of informing decisions inspiring change for the better. Recognizing that the value of assessment lies in its power to support continuous improvement, the university prioritizes the link between data-driven assessment and the educational programs and initiatives under measure and review. Three examples serve to illustrate the university's commitment to using assessment information to improve the student learning experience and inform decision-making, in line with *Requirements of Affiliation 9 and 10* and in addition to clear processes for assessment-of-assessment (S5.C5: Assessment of Assessment Process).

Academic Program Revision

The use of information derived from substantive assessment is evidenced in the university's academic program revision processes. Drawing on the information produced within these rigorous assessment processes as well as in the annual evaluation process, programs collaborate with OIE to develop and implement revisions or improvements identified by faculty in the program. For example, the Department of History had eliminated a requirement from the program, but upon assessing programmatic learning outcomes in the senior capstone course, the department found a deficiency in outcomes achievement related to that course content. As such, the program was revised to reinstate that course (S5.C3: Course Revision Example - History). As another example, the Department of Chemistry used assessment results to change its program structure to incorporate structured research coursework and opportunities for students (S5.C3: Program Revision Example - Chemistry).

Further, to ensure that changes to academic programs are grounded in data-driven assessment, the university employs a rigorous process for making changes to academic programs. Proposals for new or changes to existing programs and courses require the use of online forms that document clear links between proposed changes and academic assessment. For example, the New Program Application requires that the program learning outcomes be mapped to the department's assessment plan and supported by a substantive needs-analysis and longer-term enrollment projections. To ensure communication and an information-rich environment in academic program development, review, and revision, academic program additions or substantive changes at the department level must receive approval from the college dean, OIE, and the Faculty Senate's Academic Planning and Assessment Committee (APAC). The vice president for academic affairs makes the final approval decision

(S5.C3: New Program Application). Similarly, changes to academic programs require formal review, including the evidence used to substantiate the change (S5.C3: Program Change Form).

Course Evaluation

In addition to departmental-level evaluation of programs and curricula, academic departments can draw on outcomes from the assessment of individual courses to improve educational effectiveness. Course-level evaluation happens through several mechanisms, including student ratings of instruction, faculty review of course learning outcomes, and university-wide processes for evaluating teaching effectiveness.

As a part of meaningful evaluation of student learning, faculty members engage in ongoing assessment of learning outcomes within individual courses. Such engagement with assessment at the course level enables faculty to improve both individual course structures and larger program-level curricula. The Applied Forensic Sciences department, for example, discovered through indirect assessments that students were not being provided an opportunity to reflect upon and synthesize their learning over their entire program. To correct this issue, the department began requiring all students to complete a comprehensive capstone course (S5.C3: Applied Forensic Sciences Example of Use). Ongoing assessment at the course-level also helps faculty improve methods for collecting evidence of student learning. For example, the Religious Studies department discovered that the research paper previously used for assessment of program-level learning outcomes did not provide a full picture of what students in the program know and are able to do. In order to gather more meaningful data about student learning, the department moved to an eportfolio-based assessment tool that requires students to respond to a series of reflective prompts that faculty evaluate using a detailed rubric (S5.C3: Religious Studies Example of Use). Additionally, some aspects of the faculty evaluation also inform the ongoing assessment of educational experiences. This is evident through the focus on teaching effectiveness in the faculty review process. Classroom observations, as documented through the Classroom Observation Form, provide substantive feedback on teaching effectiveness, focusing on student engagement, communication with students, lesson strategies, pedagogy, course content, and an overall evaluation (S5.C3: Classroom Observation Form). In addition, students have the opportunity to provide both quantitative and qualitative feedback through the *IDEA* student ratings of instruction system (S5.C3: *IDEA* Diagnostic Tool).

Support Services Review

Assessment information also plays an important role in evaluating academic support services. For example, the Hammermill Library collects data on library services and space occupancy for planning and potential enhancements of the academic library through targeted data gathering tools, such as Project Outcomes. As a support service on campus, the library has established a protocol for measuring and analyzing information literacy lessons taught in the classroom and in one-on-one sessions with students. Concurrently the library also reviews the use of the collaborative study rooms as acceptable environments for student studies. The library analyzes both the growth and maturity of student skills where disseminating information is concerned as well as the library's responsibility to provide a gold-standard of comfort and service for those students in their pursuit of scholarship (S5.C3: Library Overview).

Using Assessment to Inform Decision Making

Recognizing that adequate and well-chosen resources are essential to the development, implementation, and use of assessment, the university is committed to providing support for and documentation of institutional

effectiveness. Central to this commitment is the university's success over the last decade in normalizing assessment and evaluation practices and framing these as essential to growth and planning for institutional improvement, in line with *Requirement of Affiliation 10*. Progress in this area can be seen most clearly in the strategic planning processes. For example, the 2018-2021 Strategic Plan specifically addressed the enhancement of assessment results to fuel planning for programming and services. The current strategic plan is even further grounded in use of assessment results to drive programming and includes the development of a comprehensive student outcomes dashboard to continuously monitor retention rates, graduation rates, and career/graduate school placement rates by student cohort and subgroups (S5.C3: 2018-2021 Strategic Plan; S5.C3: 2021-2024 Strategic Plan).

More evidence of the relationship between assessment results and programmatic budgetary planning can be found in the five-year self-study processes. For example, the most recent five-year self-study for the Organizational Leadership Department provided a data-based analysis that indicated the number of courses needing to be offered was placing strain on existing faculty and recommended the hiring of additional faculty. However, the data also indicated that enrollment in individual courses was decreasing in the in-person sections but not in the online sections. Motivated by these data, the college dean, OAA, and the chair of the department proposed a transition of the program to a fully online offering, as well as the revision of the program core requirements to create more flexibility for students while easing strain in terms of the numbers of courses necessary to offer each term (S5.C3: Organizational Leadership Self-Study). These changes were implemented in 2019 and will be assessed in full during the next five-year self-study for the Organizational Leadership program.

Another example of how assessment evidence was used to inform decision making and ensure sufficiency of resources centers on the transition between core curricula in the 2015-2016 and 2016-2017 academic years. To mitigate challenges, OIE worked with members of the Information Technology and Registrar's Offices to create a series of reports that led to a predictive analysis of what students had already taken and what they would need to take in the future. Using these models, OAA was able to regulate the number of course sections and the student enrollment caps in each of the new REACH curriculum areas throughout the transition (S5.C3: REACH Needs Report).

Recognizing that the effective use of assessment data in decision making is predicated on the sharing of assessment results with appropriate constituents, and in line with *Requirement of Affiliation 8*, the university utilizes a number of platforms to disseminate assessment outcomes. For example, the university shares information about key indicators, including retention and graduation rates, on the Mercyhurst website through the Student Consumer Information Page (S5.C3: Student Consumer Information Website). Similarly, program learning outcomes are posted on the departmental websites as well as in the Course Catalogs. Another example of external communication is the use of external advisory boards. In the pre- and post-licensure nursing programs, for example, information such as program completion rates, licensure exam pass rates, and job placement rates for graduates are shared in annual meetings (S5.C3: Nursing Advisory Board Sample Minutes). In addition, several programs maintain external accreditation and therefore share a range of assessment information based on their specific standards of accreditation. For example, the Respiratory Therapist program is accredited by the Commission on Accreditation for Respiratory Care and disseminates assessment results on the program website (S5.C3: Respiratory Therapist Program Website). Finally, internal constituents

communicate assessment results through various formal processes including curriculum forms/applications and funding requests, as well as informally in faculty development events sponsored by OIE.

Key Findings

- Since 2014, the university has made steady progress in establishing a culture of assessment and evaluating educational effectiveness. University departments in both the academic and student support areas demonstrate the development and implementation of goals and outcomes. The use of assessment data to inform decision making is increasingly evident, particularly in academic programming and departments. In addition, from the individual course to the curricular program level, student learning outcomes are tied to discipline goals and university mission and core values goals, ensuring that student learning outcomes are anchored to operationalizing mission and core values per the current strategic plan.
- In academic program assessment, the university has developed a system of five-year department assessment plans to achieve and maintain continuous improvement in educational offerings. In support of the effectiveness of the five-year plan, the university has redesigned the processes of new program development and existing program changes: assessment data must justify the creation of new programs or changes to existing ones. These practices reflect, moreover, both a commitment to continuous improvement and the flexibility to adjust and evolve as conditions warrant, such as in the changes to assessment reporting made in response to the global pandemic.
- The university has made great strides in ensuring the viability of sustainable assessment practices through the creation of OIE and the leveraging of information technology, particularly the Hub, to support assessment data collection and analysis and to communicate assessment data and its use to the university community. Moreover, recognizing that educational effectiveness assessment is an institutional attitude, not an office, the university has increased its effort to support and promote assessment practices, such as including the Assessment Institute as part of the annual Faculty Development Days.
- The development of a viable assessment approach to student learning outcomes in mission integration through the university's outREACH initiative demonstrates a critical commitment to student learning and the fundamental nature of the university mission and Mercy heritage.
- Mercyhurst university has brought more aspects of the total student experience under the educational assessment umbrella through inclusion of assessment of the outREACH programs as well as through changes in the use of library resources, course enrollment, career development, and alumni tracking processes.

Current Initiatives

- To both support the educational effectiveness evaluation and also create a robust pathway for addressing student concerns, the Enrollment Appeals process was updated to not only gather robust information about why enrollment appeals were necessary, but also to have all appeals reviewed by a committee of stakeholders from across the institution.
- To support and enhance assessment processes in units across the institution, OIE has engaged in several strategies, including a robust system for formal information-sharing with Deans regarding the programs

in their college; a newsletter to promote best practices in assessment; and the expansion of the Assessment Institute model to all student services units.

Opportunities for Innovation and Improvement:

1. It is recommended that the university continue and improve processes for evaluating the efficacy of existing assessment processes and implement regular review of institutional assessment strategies, with a particular focus on using gathered results.

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Chapter 8: Standard VI – Planning Resources, and Institutional Improvement

The institution’s planning processes, resources, and structures are aligned with each other and are sufficient to fulfill its mission and goals, to continuously assess and improve its programs and services, and to respond effectively to opportunities and challenges.

Overview

Mercyhurst University meets the requirements of Standard VI. A full description of the ways Mercyhurst University meets the nine criteria and all applicable sub-criteria of Standard VI, as well as the *Requirements of Affiliation 5, 8, 10 and 11*, are presented throughout this chapter.

Diverse constituents striving to share finite resources is the very definition of the small-endowed, tuition driven institution. Mercyhurst University continues the demanding task of refocusing planning and budgeting on mission-driven priorities to this day.

Grounding Planning in Mission and Strategic Priorities

Institutional and Departmental Objectives

The Strategic Planning process establishes specific outcomes and benchmarks of progress along a range of institutional priorities, in line with *Requirement of Affiliations 8 and 10* (S6.C1: 2021-2024 Strategic Plan). Objectives, both institution-wide and for individual departments, are clearly stated and directly linked to the university’s mission and goals. Institutional objectives as articulated through the university strategic plan are available both publicly on the university website and also through the Hub.

The institutional objectives within the current strategic plan were determined based on a variety of assessment data. Collaboration, reflection, and research were key in this process. For example, the president’s cabinet held a strategy retreat heading into the planning process for the 2021-2024 strategic plan “Mission Inspired. Future Ready.” in which they reviewed industry, market, enrollment, and financial data to inform decision making and planning. The results of this retreat were combined with data such as trends in higher education and comparisons to aspirant and competitive institutions to inform the strategic planning process. Focus groups with stakeholders also served to inform the objectives of the current strategic plan, such as the inclusion of student wellness (S6.C1: 2021-2024 Strategic Plan). This objective was born out of concerns expressed by students during focus group sessions and corroborated by national trends indicating that students are likely to need enhanced supports in the coming years.

Planning and Improvement Processes

Through the self-study process, it was realized that, although certain principles were used in all resource allocation conversations, these planning principles had not been formalized or clearly articulated for the wider community. As such, and concurrent with the arrival of Dr. Getz as the 13th Mercyhurst President, an August 2021 cabinet retreat created a set of guiding principles for all university budget planning decisions; some of these principles are shown in the table below.

Table 6 Principles for Budgeting Excerpt

| DO | DON'T |
|---|--|
| Preserve things that support the mission | Don't be silo driven |
| Consider mission priorities | Don't forget that teaching is central |
| Ask "is this critical for our mission" | Don't cut things that directly affect students |
| Be fair and equitable | Don't assume all expenses are equal |
| Ask "can I do without it?" | Don't treat money as the only reward |
| First, understand what the real numbers are | Don't reduce Mission to the bottom line |
| Preserve things that support retention | |
| Eliminate emotion from the process | |

Examples of how short- and longer-term planning are engaged across various areas at the institution follow:

- The Office for Institutional Effectiveness (OIE) team works with the Office for Academic Affairs (OAA), individual deans, and department chairs to create a set of needs reports for academic departments. These reports provide real-time tracking of student completion of their major requirements and allow departments to plan course offerings and manage faculty load (S6.C4: Business Core Needs Report).
- Human Resources (HR) has instituted a university-wide process for sharing data between HR and Finance regarding personnel departures to ensure short and long-term budget tracking. Specifically, HR and budget team members reconcile current account savings and overages as employees separate or change positions throughout the year. It also helps to provide a reference for changes across budget lines over time.
- Following the hire of a new Athletic Director, the athletics department proposed expanding JV teams to provide significantly more opportunities to recruit new students. In determining which teams to bring online, athletics looked at trends across the country for adding affordable enrollment opportunities and identified several strategies to fit the Mercyhurst student market. This research led to an ongoing, three-year phased implementation encompassing additional club sports.

The systems in place for planning and improvement across campus-wide units not only allow for but encourage input from stakeholders at all levels, in line with *Requirement of Affiliation 11*. For example, students often share ideas for improvement, particularly through the Recognized Student Clubs and Organization (RSCO) structure, where a recent example is the promotion and adoption of the Presence platform which allows for student participation tracking at Campus Involvement events. As another example, the Director of Information Technology Client Services & Academic Technology, who oversees classroom hardware and software, utilized data to inform critical resource decision-making. The university's capabilities in this area were crucial in responding to the global pandemic and the resulting mandates and restrictions. As part of area planning, the director evaluated podium technology-based factors, such as classroom usage, classroom type (general vs department specific), number of support calls, and age of equipment, and analyzed the impact of technology assets coming to the Erie campus because of the campus consolidation. By these means, the director was able to craft an efficient plan for technology resource deployment and present it to the area vice president for approval (S6.C4: Classroom Technology Summary).

Securing Effective Budget and Resource Allocation Processes

Mercyhurst University has processes for planning and resource allocation that are aligned with the mission and goals of the institution, grounded in evidenced-based decision-making, and that serve to advance the university's goals and objectives.

The Budget Planning Process

In 2018, to support the process of linking funding to strategic priorities more closely, the university engaged a consultant to review and evaluate the then-existing budgeting process. One finding of this review was that the budget development and post-budget support processes were not sufficiently well-defined in terms of administrative oversight (S6.C9: Eplawy Report). In response, the administration made changes focused on increasing effectiveness of the process, fostering transparency, and clarifying roles and responsibilities throughout the budget development and management process. A systematic approach to budget development was established. The annual budget planning process began with the production of that fiscal year's budget assumptions created by the president and the budget team. Either the Board of Trustees or the president might introduce further assumptions, such as mandatory surplus amounts, increases in the endowment fund, or increases in funding to reduce debt service or deferred maintenance.

Preparation for the next fiscal year budget begins in November of the previous fiscal year with projected revenues set by the vice presidents for administration and enrollment; assumptions are limited to tuition, fees, and room and board revenues. No assumptions about other revenue streams are yet included in the preparation phase. Initial calculations, based on data internally generated from a comparison of private, regional institutions, are established to set the basis for any increase in tuition and fees; these calculations are then shared with the cabinet. As part of the review process setting the price of tuition and fees, the university engaged a consultant to conduct a price sensitivity study (S6.C9: RNL Study Summary). As a result of the study, and on the recommendation of the consultant group, the university rejected a tuition reset and instead adopted a modest percentage increase in tuition for FY 2022-23. Also, as part of the study, the university created a three-year plan in which a reduction in the number and amount of fees will be phased in, beginning in FY 2022-23, in order to make pricing more transparent for current and future students (S6.C3: Budget Projection Example; S6.C3, S6.C8: Competitive Analysis; S6.C3 FY 2022 Budget Guide).

Because the university implemented the policy in 2017-2018 that all full-time traditional undergraduate students who did not live in Erie County must live on campus, and since all students in university housing are required to purchase a meal plan, more stable planning for room and board revenue is possible. In a process similar to the one described above for tuition forecasts, the process for projecting room and board revenue considers the comparative data from other private institutions in the region. As part of the review process, the university considers how increases in room and board costs affect enrollment and retention of students.

Once projections for tuition, fees, and room and board rates are agreed to by the president and cabinet and key sub-committee members of the Board of Trustees, the second phase of the budget planning process begins with the Finance Office inputting the university's fixed costs which include contract providers for maintenance, food service, and printing and mailroom services. In the case of the contract providers, the Vice President for Finance and Administration works directly with the providers to reduce costs while maintaining quality services. For example, the review process of the food service provider included analysis of reports on student use of dining

facilities from 5:00 pm until 2:00 am; from this analysis, the university concluded that closing food service at 10:00 pm would reduce costs without loss of value to students.

Concurrently, the Finance Office also examines actual spending on all non-salary budget lines over a threshold amount. A comparison is made between projected and actual spending for the first six months of the current fiscal year. The review looks for both under- and over-spent budget lines. A phased in approach will include review of all budget lines regardless of amount. The review produces data that helps the president and cabinet in determining where savings can be found or cuts need to be made before the end of fiscal year, based on the Principles for Budgeting.

Budget information is communicated to the Board of Trustees at all three annual meetings, to budget directors monthly, and to the president and vice presidents at weekly cabinet meetings (S6.C3: FY 2023 Budget Timeline).

After study within the Finance Office and as a result of recommendations from a consultant review, the Finance Office begins the process of producing five-year budget projections in this calendar year.

The Auditing Process

The Audit Subcommittee of the Board of Trustees is responsible for the appointment, compensation, retention, oversight, and approval of services provided by an independent accounting firm, in line with *Requirement of Affiliation 5 and 11* (S6.C7: Mercyhurst University Trustee Charters). At its spring meeting, the audit subcommittee reviews the independent auditor's plan. During its fall meeting, the committee reviews the results of the annual financial audit of the university's financial statements and any other attestation services provided. Annual independent audits and financial statements issued with an unmodified audit opinion confirm the university's financial viability. The audit committee reviews a Comparative Financial Ratio Report prepared by the independent accounting firm when the report is available (S6.C7: BOT Audit Subcommittee Minutes 09-2021).

The annual financial statements are used by the university's staff, primarily in the Finance Office, to fulfill compliance requirements, prepare analyses and projections, and respond to financial information requests such as annual insurance renewal forms and grant applications. The financial statements are also used by the external audit firm to prepare a Comparative Financial Ratio Report. This Comparative Financial Ratio Report is reviewed annually by the audit committee of the Board of Trustees (S6.C7: Audited Financial Statements; S6.C7: FY 2020 Report to the Audit Committee; S6.C7: Comparative Financial Ratio Reports).

Stewarding Sustainable Planning for Institutional Resources and Infrastructure

Human Resources

(HR) is at the center of the university's commitment to reflecting mission values in employee practices. As detailed through its Hub site, HR's mission commits to supporting "the university's mission to recognize the dignity of work and the importance of service to others."

HR works with area vice presidents to ensure that enough competent faculty and staff are available to meet student or other institutional needs. As the trigger for employment actions and system updates for employee position and status changes, both the Personnel Requisition Form and the Personnel Action Form (PAF) serve as

the record of all hiring actions at the institution, including new hires, changes in position or salary, and terminations. The hiring process was updated several times following information the university received after hiring an HR consultant in 2018 to review the functioning of HR. One finding from the consultant's work was that the hiring process was burdensome and inefficient from the perspective of the vice-presidents. After assessing the consultant's finding, the process was updated to streamline the approval process. Further improvements were made in 2019-2020 and culminated in the transition of the entire process to an online format via the university's existing E-trieve system; in early 2022 the PAF process to hire new employees was moved to an online system, creating efficiencies in the hiring process (S6.C4, S6.C5: Online PAF). The average time from submission of PAF to hiring letter in 2018 was between 3-5 weeks with only real paper documents. The process now takes approximately 3 days and is all online.

Responsibility for employee grievance procedures also rests with HR. Employees have multiple avenues for filing a grievance, as outlined in the Employee and Faculty Handbooks (S6.C5: Employee Handbook p.21; S6.C5: Faculty Handbook p.89).

HR conducts exit interviews of all employees leaving the university to collect and assess reasons for departure, ensure collection of university property and equipment, and address any benefits transition issues. The information obtained in the exit interview can at times be used to assist in identifying ongoing points of friction within a department or area of the university. The information can also be used to inform discussions related to compensation and the market rates for particular positions. For example, HR has begun using a tracking spreadsheet that will allow for a more formal process analyzing the reasons for departure and sharing that information with vice presidents. This information ultimately assists HR in providing valuable information and insight to cabinet and other relevant decision-making groups related to compensation and benefits (S6.C4: Compensation Philosophy; S6.C4, S6.C5; Position Change and Termination Spreadsheet Sample).

Information Technology

Effective stewardship of resources and sustainable planning is also grounded in the coordination between the Information Technology (IT) department and other university units. IT offers extensive flexibility and supports many platforms required for effective administration and teaching at the university (S6.C4: List of IT-supported Software). To serve its constituents, IT offers The IT Roadshow, which enables departments or individual employees to request a consultation with IT staff. For example, HR scheduled a session in the Fall of 2019 to learn how to increase efficiencies through technology, such as synching individual calendars and creating an interactive department calendar (S6.C4: IT Roadshow Example). As another example, in support of the campus-wide transition to remote learning in March of 2020, IT staff focused on the shift to virtual learning for students, synchronous instruction for faculty, as well as increased migration to remote work for staff and administrative employees. IT staff offered instruction to all employees on, for example, how to transfer office phone lines to personal cell phones and use virtual meeting platforms, such as Teams, to continue the essential work of educating, recruiting, and supporting students. Through such Initiatives, both HR and IT support the strategic plan by improving efficiencies and supporting employees in their efforts to be better stewards of the university's mission and core values (S6.C4: IT Service and Training).

The principle behind technology innovations at the university, while always an important aspect of fulfilling the university's mission and goals, has been to strengthen technological infrastructure to support operations and

the delivery of programs. For example, to increase digital security, Mercyhurst has implemented a Multi Factor Authentication (MFA) procedure for logging into the university system (S6.C4: IT Policies). In addition, the maintenance of technological infrastructure is accomplished, in part, through the IT Ticket System located on the university's IT website and as a quick link on both the Employee and Student Hub pages (S6.C4: IT Ticket System Overview; S6.C4: IT Ticket Examples).

Finally, the use of technology in academics, human resources, finance, enrollment, marketing, and student life allows directors and vice presidents to make accurate, data-driven decisions in real time. An example of the ongoing assessment and planning process for technical infrastructure can be found as the university worked to meet the demands of responding to the global pandemic. Student Life and Academic Affairs needed to track the status of a student in quarantine or isolation in real time. In collaboration with IT, an existing program used to track enrollment was adapted to produce a case management system that interfaced with the main administrative system to, for example, generate emails to the Office of Student Services for sending remote study notifications to the affected student's faculty members or provide real-time data as to where and for how long a student would be in quarantine or isolation to all need-to-know departments, including academics, athletics, maintenance, and food services. The system allows students and employees to upload their vaccine documentation, sends appropriate correspondence and then allows for contact tracers on the COVID 19 team to contact trace, track, and monitor all contacts, close contacts, and positive cases. Appropriate correspondence is sent out throughout each stage of the process. Though hard to quantify exactly, approximately 500 hours has been dedicated put into building, maintaining, and updating this platform, which is still being used.

Physical Infrastructure

Among the four goals identified in the 2018-2021 "Renewal Through the Mercy Mission" strategic plan were two key goals relating to infrastructure: Goal 2, to "Renew Our Campus Culture"; and Goal 3, to "Renew the University's Resources, Processes, and Infrastructure." Several items outlined in the second goal include the creation of a sophomore residence hall on the Erie Campus, as well as investing in the improvement of athletic facilities for student-athletes (S6.C4: 2018-2021 Strategic Plan; S6.C4: Ryan Hall Needs Analysis; S6.C4: Laker for Life Campaign Summary; S6.C4: Mercyhurst Property Inventory 09-2021).

Like the IT Ticket system described above, a Maintenance Ticket System is also located as a quick link on the main Employee and Student Hub pages. This system was implemented to request any maintenance related work: Electrical, heating/cooling, plumbing, and building maintenance, such as door repairs, ceiling tiles, or lights. Requests for custodial services and notifications about landscape or grounds can also be processed through this system. Ticketing begins with the employee or student submitting contact information, along with a description of the requested work. A confirmation email is sent, and a staff member from the appropriate maintenance team reaches out for further details, at which point a date and time is established for performing the requested work.

The goal of renewing the university's resources, processes, and infrastructure has been addressed in several areas. For example, the goal calls for the development of a deferred and preventative maintenance plan. In a report presented to the Board of Trustees in February 2020, the chair of the strategic planning process noted that from the list of projects identified on the deferred and preventative maintenance plan, 29 had been completed. These actions included remodeling projects, renovations, and new construction efforts aimed at

reducing deferred maintenance needs in campus academic, athletic, and residential spaces. A second key initiative of goal 3 was to improve university-wide efficiencies, with a particular focus on processes and data accessibility. Within this goal there were 55 completed projects that have substantially improved operational efficiencies and data accessibility across the university. In addition, there has been a renewed focus on employee training opportunities in both group and individual settings as additional technologies are brought online. As new technologies and practices are being implemented, there are corresponding procedural and policy guidelines established. This helps ensure data accuracy and consistency and that proper security controls are in place from the launch of these technologies (S6.C6: New Technology Initiatives Summary).

Engaging Resource and Planning Toward Institutional Improvement

Decision Making and Accountability

The strategies summarized above require a stable financial environment to be successful. As part of ensuring that stability, the university employs systematic processes to connect funding requests within budgets to mission, strategic priorities, and data. For example, budget management policies and procedures forms are used to request additional funding for capital and specific projects; these policies and forms guide budget directors in entering budget and reallocation figures to reflect more accurately actual expenditures. A set of forms is used during the budget development process to modify current funding levels within individual cost centers in the case of requests for new or additional funding in the operating budgets, the procedures and forms require budget directors to connect changes in funding to the mission, core values, and the current strategic plan. Budget requests must include an explicit consideration of the university's revenues and expenses (S6.C2, S6.C5: Budget Process Roles and Responsibilities; S6.C2, S6.C5: Budget Request Forms).

Assessing Effectiveness

The university utilizes compliance activities that satisfy a variety of regulatory requirements to assess its fiscal and physical resources, in line with *Requirement of Affiliation 5*, such as the Continuing Disclosure of Bond Compliance, FISAP and IPEDS reports, Indirect Cost Rate, and S&P Bond Rating Reports, fundraising reports, and the Annual Cash Graph.

In the finance area, the university draws on a variety of sources to monitor outlook and inform decision makers. For example, the Finance Office maintains the university's S&P Bond Rating Report. The most recent S&P Bond Rating Report for the university is dated January 30, 2020. In that report, S&P rated the university's long-term bond rating BB with a Stable Outlook. The university's current debt portfolio includes only fixed interest rate issues, which are less price sensitive to ratings changes. Other considerations in financial decision-making include the university's bond issues. These requirements are outlined in a Continuing Disclosure Agreement for each bond issue. In addition, the Annual Filing contains the Audited Financial Statements, along with an appendix of historical data on the university's history, governance, accreditation, principal officers, facilities, academic programs, enrollment, applications and acceptances, student quality, student housing, student fees, and competition. The Annual Filing provides an assessment of the effectiveness of the university's planning, resource allocation, and availability of resources at the institutional level.

Table 7 Sample Financial Adequacy Measures

| Assessment Tool/Strategy | Information Preparer | Stakeholder/User | Intended Use | Example of Use |
|---|--|---|--|---|
| Fiscal Operations and Application to Participate Report (FISAP) | Produced annually, jointly by the Office of Student Financial Services and the Finance Office. | Department of Education for Campus Based Aid Programs such as Federal Supplemental Education Opportunity Grant (FSEOG) and the Federal Work Study (FWS) | One factor in assessing the amounts to award an institution for each program in future years. | (2016) Finance, SFS, HR, Payroll analyzed the FWS spending. It was a deliberate choice by Finance to reduce the amount of institutional work study funding. To do so, the awarding philosophy in admissions was changed (lower EFC for eligibility, and indicator on FAFSA had to be YES) in order to lower the number of eligible students in the mix. Number of positions were maximized at each campus by Finance. |
| The Financial Indicators Tool (FIT) | the Council of Independent Colleges (CIC) | Presidents of member colleges | Customized for each institution and containing an institution's unique data, the FIT presents a clear assessment of an institution's financial performance over time with benchmarking comparisons to similar institutions. The organization and format are similar to CIC's Key Indicators Tool (KIT), though the indicators in the FIT focus exclusively on financial conditions, measuring resource sufficiency, debt management, asset performance, and operating results. These four measures are then combined, resulting in one score for the overall financial strength of the institution. The FIT distills the complex financial operations of a college or university into one concise report that can assist | Data from the FIT was presented to the Board of Trustees for review. After considering this assessment, the Board decided to institute a policy wherein a reserve would be required during each budget year. 3% of the net revenue must be reserved each year starting the 2023 fiscal year. |

| | | | | |
|--|--------------------|--|--|---|
| | | | presidents in understanding and explaining to others the institution's fiscal state. | |
| Monthly financial statements including comparisons to prior year actuals and current year budget | Finance department | Administration and Board of Trustees | Provides timely and accurate financial analysis to identify trends or fluctuations that can be addressed in a timely manner. | If actual revenues are trending below budget, management can take steps to respond accordingly. |
| Consolidating financial statements | Finance department | Administration and Board of Trustees | Separates the major components of the university's consolidated statement of operations to provide better understanding of the overall financial activity of the institution: a. Budgeted operating accounts b. Cares Act/HEERF Student awards and distributions c. Grants, institutes and other activities not included in the budgeted operation accounts d. HIDTA | The university is the fiduciary for several High Intensity Drug Trafficking Areas (HIDTA) and the associated revenues and expenses can exceed \$10 million annually and have a significant impact on the revenue and expense accounts in the consolidated financial statements. By breaking these accounts out separately, the user of the financial statements is better able to understand operational activities from non-operational activities |
| Worksheets allocating the annual budget to each month of the fiscal year | Finance department | Budget Directors, Administration and Board of Trustees | Annual budgeted revenues and expenses are allocated to each month of the fiscal year based on the periods that revenues are earned and when expenses are incurred based on seasonal activities and in accordance with Generally Accepted Accounting Principles (GAAP) | Tuition revenues are budgeted and recognized in the months of the semesters in which the revenues are earned rather than when billed. Budgeted costs of annual repairs and maintenance are weighted heavily in the summer months when a significant amount of activity occurs in preparation for students to return for the fall semester |

A summary of other activities used to measure the adequacy of institutional resources and the efficiency of their use is found in the table above.

COVID-19

The financial effects of COVID-19 manifested in March 2020 when the university closed all on-campus residences for safety reasons. Every student was credited or reimbursed the prorated cost of room and board. In addition to lost revenue from room and board, the university also lost revenue from the bookstore and cancelled events. Additional costs were incurred for supplies, testing, and cleaning related to mitigating the spread of the virus. As evidenced in the table below, the university used Higher Education Emergency Relief Fund (HEERF) disbursements in two ways. First, funds were directly returned to students in 2020, 2021, and 2022. Second, funds were used for infrastructure, including IT, to support remote teaching and learning as well as to make improvements in HVAC systems needed to enhance mitigation efforts (S6.C8: HEERF Utilization Summary).

Key Findings

- Grounding planning processes in clearly articulated mission links, the university's administration is a thoughtful steward of Mercyhurst's finite resources. Since 2018, in fulfillment of the university's strategic plan, the administration has significantly increased the allocation of resources to enhance mission-resonant academic and co-curricular student experiences and in necessary technology support.
- With mission so prominently featured in the two most recent strategic plans, the university has made significant progress in determining what of the many possibilities will become capital projects. Similarly, the university's planning regarding deferred maintenance and debt service shows progress toward bringing all aspects of the university's finances into alignment with mission and core values.

Current Initiatives

- In a significant and broad initiative, the administration has adopted a refreshed view of the budget system. The motto of this initiative is "the budget is a tool to do everything we do, better." A set of clearly articulated processes and procedures establishes well-defined and mission-driven guidelines for how the budget should be created and used. To support this effort, the cabinet has engaged in deep study to ensure that this approach is sustained.
- As an example of a more specific initiative, responsiveness to changing network use is increasing efficiency across campus. One of the data points IT monitors is the number and types of devices registered on the network. Over the past several years, more and more devices are being registered on the network. Each student is now registering 4-6 devices on the network including non-traditional items such as lightbulbs. Formerly, the campus network management system did not allow students to register such novel devices on the network themselves. As one of the goals of the 2018-2021 strategic plan was to improve operational efficiencies including systems and processes, IT implemented a process that automates the registration of non-traditional devices. This not only improved the operational processes for IT itself but also improved the student experience. Allowing students to register these devices on the network themselves rather than having to contact IT reduced a burden to everyone. Assessing the outcome of the new process, the number of inefficient manual registrations of non-traditional devices has fallen by approximately 80%.

Opportunities for Innovation and Improvement

1. It is recommended that the university continue to develop explicit and transparent means for linking the university budgeting process to mission and strategic priorities and for communicating those processes to university constituencies. Specifically, the university should be able to clearly link the assessment of resource allocation and use to the overall ability of the university to fulfill its mission.
2. It is recommended that the university continue efforts to address deferred maintenance and debt service and to ensure the financial sustainability of a small-endowed, tuition-driven private university in a complex and competitive higher education market.

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Chapter 9: Standard VII – Governance, Leadership, and Administration

The institution is governed and administered in a manner that allows it to realize its stated mission and goals in a way that effectively benefits the institution, its students, and the other constituencies it serves. Even when supported by or affiliated with governmental, corporate, religious, educational system, or other unaccredited organizations, the institution has education as its primary purpose, and it operates as an academic institution with appropriate autonomy.

Overview

Mercyhurst University meets the requirements of Standard VII. A full description of the ways Mercyhurst University meets the five criteria and all applicable sub-criteria of Standard VII, as well as the *Requirements of Affiliation 7, 12, 13 and 14* are presented throughout this chapter.

A governing body, the Board of Trustees, which guides the implementation of Mercyhurst University's mission, vision, and core values, and takes seriously its fiduciary responsibility through effective strategic planning, is vital to the success of a university, in line with *Requirements of Affiliation 7 and 12*. Mercyhurst University recognizes the important elements of a well-defined system of governance, the value of a visionary and strategic leader, and the critical importance of administrative organization and composition in service of the mission. The governance structure and administrative leadership of the university ensures that the mission is the inspiration which underpins the execution and planning of the academic enterprises. Further, recognizing the importance of effective leadership, the university regularly evaluates the performance of its president and the senior administrative team (S7.C5: Executive Performance Review).

Mercyhurst University operates within a shared governance model that identifies the governing bodies of the institution within each constituency. The main governing body referred to in this self-study is the Board of Trustees, which operates under a clearly defined set of bylaws that articulate the respective roles and responsibilities of the full Board and its subcommittees. Other critical constituencies in the shared governance model also function under articulated bylaws, including the University Council, Faculty Senate, Staff Senate, and Mercyhurst Student Government (MSG).

Governing the Institution: The Board of Trustees

Through the Mercyhurst University Board of Trustees, the university maintains a legally constituted governing body that has faithfully served the public interest since the university first opened its doors on September 20, 1926. As per the Mercyhurst University bylaws, the governing body is charged with overseeing the implementation of the university's mission and has fiduciary responsibility for sustaining and promoting the fiscal health of the university. Additionally, the governing body is responsible for oversight of the academic quality and integrity of the university. The Board of Trustees adheres to the principles of good practice, as outlined by the Association of Governing Boards, and in line with *Requirement of Affiliation 13*, and ensures that the governing board or its members do not interfere with day-to-day operations at the institution. All members of the Board of Trustees receive a copy of the "Trustee Responsibilities" document annually. As evidenced by the minutes of its governance subcommittee, the Board of Trustees reviews and updates the Mercyhurst University Bylaws as needed and consults the bylaws as part of its regular operations (S7.C5: Bylaws of

Mercyhurst University). The university's bylaws include specific ethical standards in university governance, in line with *Requirements of Affiliation 13 and 14* (S7.C2: BOT Conflict of Interest Disclosure).

The full Board of Trustees meets at least three times each year, and a set of subcommittees provide opportunities for more specific information to be reviewed with members. These subcommittees often provide the impetus for conversations within the full board. For example, a report from the subcommittee on building and grounds, after a campus tour of student housing, led the full board to make student housing a university strategic priority, resulting in the construction of two state-of-the-art residence facilities in the past eleven years: Warde Hall opened in 2010; Ryan Hall opened in 2018. As another example, the board's subcommittee on academic affairs reviewed and ultimately recommended to the full board a dramatic revision of the general education core requirements resulting in the implementation of the REACH curriculum. As detailed in Chapter 3, the Board of Trustees is deeply committed to the university's mission and to ensuring that the university fulfills that mission. Through focused efforts, such as review of the mission and core values conducted by the board's subcommittee on mission in February 2021 or through active engagement with the Conference on Mercy Higher Education (CMHE), including a successful visit and review in 2020, the Board of Trustees keeps mission and Mercy at the center of university strategic development. Through its subcommittees and as a full governing body, the Board of Trustees provides responsible leadership in ensuring that the university fulfills its mission and goals in the context of sound fiscal management and a commitment to academic excellence (S7.C2: CMHE 2020 Self-Study).

Recognizing the critical importance of sound financial management to every other aspect of the university operations, the Board of Trustees demonstrates stewardship of university resources (S7.C2: BOT Summary of Financial Decisions). Like many private religiously-affiliated colleges and universities of its size, Mercyhurst university is largely tuition and room and board dependent, and a smaller-than-average endowment does not provide resources for operational deficits. Cognizant of these factors, the Board of Trustees prioritizes sound financial management to maintain economic stability. A stated financial goal of the Board of Trustees in the strategic plan is to increase net tuition revenue. In addition, the Board of Trustees and the university administration have worked together to increase significantly fundraising, which has permitted the university to pursue important facilities project, such as upgrading athletic facilities, including the Vorsheck Athletic Complex and Saxon Field, as well as renovations the Mercyhurst Athletic Center (S7.C2: Board of Trustees Fundraising Summary).

As the governing body, the Board of Trustees fulfils its obligation to ensure that the university is afforded high-quality leadership in keeping with the mission. The Bylaws of Mercyhurst University state that the Board of Trustees has the responsibility to appoint the university president who shall be the university's chief executive officer, and set appropriate terms of employment, including compensation (S7.C2: Bylaws of Mercyhurst University). The bylaws outline that the university's president shall be charged with the responsibility and plenary authority for all acts necessary to implement the decisions of the governing body. In terms of review and evaluation, the Board's subcommittee on compensation is responsible for the review of the president's performance annually in the context of the university's goals and objectives and all other relevant factors and to make recommendations regarding the president's compensation based on this review (S7.C2: Record of CEO Evaluation). In addition, when the university begins a search for a new president, the Board of Trustees appoints a search committee comprised of a representative group of trustees, administrators, faculty, staff, and students,

and provides charges to the search committee as the official directive to the Presidential Search Committee (S7.C2: Presidential Search Website).

Providing Strategic Leadership: University President and the President's Cabinet

Since the last decennial review, Mercyhurst University has experienced several changes in leadership. Dr. Thomas Gamble, Mercyhurst's 11th president, retired in 2015. After a national search conducted by the Board of Trustees, Michael T. Victor was appointed as the university's 12th president. President Victor announced his retirement in October 2020. As documented in the February 2021 minutes of the Board of Trustees, when President Victor retired in February 2021, then chair of the Board of Trustees and Mercyhurst alumnus Joseph NeCastro temporarily stepped down from his trustee role to assume the role of Interim President of Mercyhurst University. On May 11, 2021, the Board of Trustees announced the appointment of the university's 13th president, Dr. Kathleen Getz, whose tenure as president began in July 2021 (S7.C3: Presidential Profile for Dr. Getz).

As shown on the university's organizational chart, the President's Cabinet consists of eight area/division vice presidents (S7.C3: President's Cabinet Organizational Chart). The profiles of the area vice presidents demonstrate not only qualified and experienced leadership but also strong commitment to both the mission and Mercy heritage of Mercyhurst University (S7.C4: Cabinet Profiles). In addition to defining the key administrative designations of the president's cabinet, the organizational chart outlines the departments within those areas with direct reporting lines to the area vice presidents, including deans and associate vice presidents. Area vice presidents oversee departments appropriate to their assigned administrative area and are responsible for ensuring high standards of professionalism, effective communication, and best practices.

Operationalizing the Strategic Plan: University Administration

Essential to the success of any university are administrators with institutional knowledge and an understanding of operations ranging from the frontlines of service to boardroom policy development. Mercyhurst University's organizational chart clearly defines each administrative unit and the reporting structure to the area vice president (S7.C4: University Organizational Chart). Within the academic units, a dean oversees the operations of each college (S7.C4: Academic Dean Profiles). Ultimately, it is the responsibility of the area vice presidents to ensure that administrators have the necessary credentials and experience consistent with the mission to ensure the efficient and effective operation of the university.

Annual performance reviews conducted through the Office of Human Resources are designed to enable professional development through formative goals and to ensure consistent quality review (S7.C4: Performance Review Process).

Modeling Shared Governance

The university is committed to a shared governance model which encourages and provides opportunities for frequent and effective communication and collaboration between university constituencies. Through this commitment, the governing body is guided in its actions by a constituency-based governance model that enables review and recommendation on a wide range of issues and concerns. Through their various senates and associations, the faculty, staff, students, and alumni participate in the life of the university, regularly engaging with administrative leadership, including the president and area vice presidents. Each of these organizations, Faculty Senate, Staff Senate, Mercyhurst Student Government, Alumni Association, and University Council, has

its own constitution or bylaws framing both its purviews and pathways for communication with administrative leadership. For example, serving as a node linking the various constituencies and their representative bodies, the University Council is comprised of administration, faculty, staff, and students. Through these constituency-based organizations and their standing committees, the governing body is supported by a clearly articulated and transparent governance structure that draws upon the knowledge and experience of the university's dedicated, talented, and mission-committed administration, faculty, staff, and students (S7.C4: Faculty Handbook p.21; S7.C4: Staff Senate Bylaws; S7.C4: MSG Bylaws; S7.C4: Alumni Association Bylaws; S7.C4: University Council Bylaws).

Evaluating Effectiveness

Regular assessment and evaluation of the administration is a critical component in support of the continuous improvement in the efficiency and effectiveness of the university. The Board of Trustees' subcommittee on compensation is responsible for the review of the president's performance annually in the context of the university's goals and objectives. The university's president is responsible for evaluating the unit vice presidents, which follows the standard employee review process (S7.C5: VP Executive Performance Review). In addition, recognizing the importance of faculty feedback in academic affairs, the Administrator Evaluation Committee (AEC) facilitates evaluation of the vice president for academic affairs, deans, and associate deans of the four colleges (S7.C5: Faculty Handbook p.25).

As the operational plan for the 2022-2027 strategic plan is developed, human resource needs will be considered. This assessment will affect whether changes to organizational structure and employee deployment are needed. Annually, the cabinet will review progress on the strategic plan; this will include consideration of organizational structure.

COVID-19

During the early stages of the COVID-19 pandemic, the university implemented a robust plan managing all aspects of the university's response. Specifically relating to governance structure and administrative leadership, the university appointed a pandemic officer who was responsible for leading the university's critical incident response team. Under the pandemic officer's direction, a COVID-19 task force was assembled and charged with guiding university policies and initiatives in response to the coronavirus pandemic. The task force included administrators, staff, and faculty from all university constituencies. Prior to the students' return to campus for the fall 2020 semester, the task force held training sessions for all employees to highlight key components of the plan to safely return students back to campus. The task force also oversaw the process, recruiting twenty staff members to complete a certificate program to be trained as contact tracers and oversee the tracking and implementation of contact tracing at the university. Recognizing the need for an "all hands-on deck" approach, the university Board of Trustees drew upon the example of the Sisters of Mercy in mobilizing an extraordinary level of cooperation and communication among leadership and the various constituencies. For example, as evidenced in the minutes of the COVID-19 Task Force, the chair of the Board of Trustees engaged heavily with the COVID-19 Task Force during the critical period of taking the university remote in March and early April 2020. Moreover, three special meetings of the Executive Committee of the Board of Trustees were convened in April, May and August 2020, to discuss the impacts of and the university's response to COVID-19. Finally, the full Board of Trustees engaged in discussion of COVID-19 response and strategy at its June and August 2020 meetings just prior to the return of students to campus.

During the fall semester 2020, the Mercyhurst University pandemic officer convened a COVID-19 testing committee consisting of administrators, staff and faculty charged with researching and providing recommendations to the administration regarding COVID-19 testing strategies. At the recommendation of the committee, the Board of Trustees approved a robust COVID-19 testing plan involving pre- and post-arrival testing, surveillance testing among the campus community, regular testing of student athletes for Return to Play as outlined by the National Collegiate Athletic Association (NCAA), and on-demand testing for symptomatic individuals at the University Health Center.

Key Findings

- In the Board of Trustees, the university has a sufficiently sized and adequate-in-scope governing body that functions in an oversight role to ensure integrity in academic programming and compliance with all accreditors and to exercise its fiduciary responsibility for sustaining the material health of the university. The Board of Trustees has access to critical academic and financial information required to make informed decisions for the benefit of the university through its subcommittees, which include area vice presidents as liaisons, as well as representatives from faculty, students, and alumni. Further, the governing body interacts with, provides communication pathways for, and elicits feedback from university constituencies as appropriate.
- The governing body demonstrates a clear commitment to ensuring experienced and effective administrative leadership, particularly with regards to the university's president. In developing and implementing a systematic approach to the presidential search process, including a national search process conducted by a professional search organization, the Board of Trustees has acted to ensure that the university is led by a highly credentialed professional with sufficient experience and expertise to lead an institution of higher learning. In addition, the Board of Trustees has engaged in a formal evaluation process of the president in terms of key performance indicators, among them furthering the mission and core values of the university and has effectively maintained organizational stability and the confidence of its constituency through several presidential transitions.
- The president of the university is directly served by eight area vice presidents who are sufficiently credentialed and experienced in their respective domains. Meeting weekly as a group with the president allows vice presidents to interact with each other to ensure that all departments and units are appropriately resourced and supported and that decisions vital to operations are being made in a timely manner and at the level most appropriate to the concern.
- The president and cabinet advance efforts toward transparency in operations and shared governance through a variety of mechanisms, including monthly communications with the entire university community (S7.C1: University Update Samples).
- The governing body demonstrates a responsible and respectful interest in constituency concerns through an ongoing commitment to and support for the shared governance model. Together with administrative units and bodies such as the Faculty and Staff Senates, Mercyhurst Student Government, and the University Council, the governing body promotes an information-rich environment that results in effective decision-making, supports effective policies and procedures, and ensures continuous improvement of the institution through the shared governance model.

Current Initiatives

- The annual vice president evaluation process has been updated to clearly ask vice presidents whether they have sufficient staff to carry out the necessary functions. This provides direct information about the appropriateness of the organizational structure.
- As an effort to continue building a culture of transparency, all constituents receive a summary of the monthly report that is prepared by the President for the Board of Trustees.

Opportunities for Improvement and Innovation

1. It is recommended that the university consider ways to ensure annual updating of all organizational charts and the governance model and to make the shared governance model and university organizational charts more widely available and easily accessible to all constituencies.
2. It is recommended that the university continue to seek ways to strengthen communication about and understanding of evaluation in the context of mission and university goals, ensure that administrator evaluation takes place at all levels, and provide both training for evaluators and easier access to information about evaluation processes to the affected constituencies.

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Chapter 10: Conclusions

As a result of the current self-study process, Mercyhurst University has been able to identify key strengths and important opportunities for the continued improvement.

Among its strengths is that the university has remained committed to centering mission in all operations and functions. The findings and evidence presented in this self-study demonstrate that Mercyhurst University possesses a strong understanding of its identity, mission, and core values. The university demonstrates that the traditional liberal arts and contemporary career-programs have aims that are inclusive of, and even vital to, each other and therefore continues to fortify the links between the liberal arts and the career-preparation programs. Perhaps chief among its strengths is that, since its last self-study, the university has successfully shifted its understanding and use of assessment practices to improve all programs and the general education curriculum.

Like all human institutions, the university acknowledges areas in need of further sustained progress in order to accomplish the alignment of all units necessary for achieving that culture of continuous improvement. This self-study process has revealed additional opportunities for operationalizing assessment practices in order to support a more informed community. Ongoing efforts to help all stakeholders understand the value and importance of assessment will continue to build decision-makers who take full advantage of the information-rich environment that is possible with a fully incorporated assessment system.

Further, the self-study process has clarified the challenges faced by a religious-affiliated, small, tuition-driven institution in this region of the United States. There are potential threats in terms of enrollment, retention, and resource allocation that must be converted into opportunities. Ensuring sufficient resources to carry out the mission-critical functions of the university is an area requiring continuous assessment and response.

While the challenges posed by full incorporation of assessment practices into all units of the university in particular and by the current landscape for higher education in general are real and serious, they are not beyond the will or the abilities of the university. With a strong belief in mission as motivation, the Mercyhurst community will meet the tests and overcome the impediments to achieving the culture of continuous improvement.

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Self-Study Process Participants*

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Dr. Dyan Jones, co-chair, Dean of the Zurn College of Natural and Health Sciences, Associate Vice President for Institutional Effectiveness, Associate Professor of Physics

Dr. Carrie Allen, Assessment Coordinator

Nicholas Brodfuehrer '22, Mercyhurst Student Government President

Dr. James Snyder, Associate Professor of Philosophy

Michael Heller, CFO and Vice President for Finance and Administration

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Dr. Chris Magoc, Professor of History

Dr. Sister Lisa Mary McCartney RSM '71, Mission Associate

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Jan Haas '02, '06, Associate Dean of Zurn College, Assistant Professor of Physical Therapy, and Director of Physical Therapy Assistant Program

Colin Hurley '13, Director of Community Engagement

Katie Ishler '03, '06, Senior Instructional Designer

Gillian Mazur '22, Student Representative

* The list of participants reflects each individual's current role/title at the institution, which may have changed since the self-study process began.

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