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Faculty also have impressive representation/leadership on the boards of non-profit organizations (ongoing). Mercyhurst faculty serve on the boards of directors of a variety of non-profit organizations throughout the region, including, for example: Harborcreek Youth Services (Criminal Justice faculty); Preservation Erie (which History faculty also co-founded); Lake Erie Region Conservancy and other local environmental organizations (Biology); and anti-graffiti efforts in Erie (Intelligence Studies).

Also noted were Mission-driven senior capstone projects, such as the Public History program’s *You Are Here, We Are Here*. Working closely with the Office of Community of Engagement and the Sisters of St. Joseph Neighborhood Network, in 2015-17 Public History faculty and students developed a multi-faceted community history project on Erie’s culturally rich but underserved Eastside. Oral history interviews, a museum exhibit, and a beautifully illustrated historical guidebook celebrated the history, distinctive built landscape, and common threads of the Eastside immigrant experience from Poles and Germans to recent refugee communities from Somalia and Iraq. In addition, history faculty presented an early version of *A Shared Heritage: African Americans in Erie County—A Driving and Digital Tour* (completed in August 2020). A collaborative effort of faculty and students from Public History and Graphic Arts and Computer Design, *A Shared Heritage* offers a brochure and website richly documenting the history of African Americans in Erie County from slavery to the contemporary era.

Another example of local outreach is the “Gliding Stars” event that welcomes local special needs children to the ice center to partner with students for a beloved ice-skating event. This program celebrated its 20<sup>th</sup> anniversary in 2019. As another example, students in Dr. Averill Earls’s “Digital History: Documentaries” class in the spring of 2019 were challenged to produce short video documentary histories—*Hurstories*—that illustrated both Mercyhurst history and how people in the Erie community “make mercy real” by living out the Sisters of Mercy’s Critical Concerns: Immigration, the Earth, Racism, Nonviolence, and Women. They were compelling testimonials of how the Mercyhurst Mission is alive, both in the broader community and across our curriculum. There is ample evidence that these Critical Concerns of the Sisters of Mercy especially influence ongoing programming at the university, especially in academic areas.

Reflective of the **Critical Concern for Women**, the university sponsored a Women with Children program on the North East campus from 2017-2019, established specifically to support single mothers in associate degree programs. Students were offered free housing and a variety of

personal and programmatic supports. This program is officially on pause amidst the consolidation of the North East campus to Erie; however, the department of Community Engagement continues to individually support single parents through regular check-ins and logistical support. The university also engaged in Women's Suffrage Centennial/Voting Rights Events during AY 2019-2020. In collaboration with a coalition of regional organizations led by the Erie County League of Women Voters, the Departments of History, Political Science, and Anthropology conducted a series of campus events in Academic Year 2019-2020 to mark the centennial of women's suffrage, and also to raise the overlapping contemporary, urgent concerns over voting rights in America. The series led off with a multi-disciplinary faculty panel (attended by nearly 100 students) and screening of *Iron Jawed Angels*, followed by a Teach-In on Voting Rights (with an audience of more than 50% from Erie's African American community), and culminating with a public lecture from Professor Danielle McGuire, who spoke on the historic connections between sexual terror against Black women and the rise of the civil rights and voting rights movements.

The Sisters of Mercy have frequently connected efforts for women and children to efforts to fight poverty. The Department of Social Work and Sociology has played a central role in spearheading perhaps the most significant anti-poverty initiative in Erie County in decades—Erie Together. This grant-funded community partnership with the Greater Erie Community Action Committee (GECAC) has been working for more than a decade to address through a variety of strategies the stubbornly persistent scourge of poverty in Erie County. The initiative serves as a catalyst for fostering system alignment aimed at fostering opportunities for Erie County residents to learn, work, and thrive. Representative of how Erie Together efforts engaged our students: in September 2017, more than 60 Mercyhurst students participated in a poverty simulation program in partnership with GECAC at Sts. Peter and Paul Church. In the same spirit, Social Work faculty also played a lead role in Vital Signs, an effort by the Erie Community Foundation to track key indicators of the quality of life in the region. And finally, "Empty Bowls," an annual fundraising event spearheaded by the Social Work Club, its faculty, and faculty and students from the Art Department from 2005-2016, raised an average \$4,500-\$6,000 each year to support the work of Second Harvest Food Bank, a non-profit community organization in the city of Erie.

Reflective of the **Critical Concern for the Earth**, environmental sustainability is a longstanding concern of the university; however, the office of Sustainability has seen many changes over the past decade. The university has several structures in place that advance this priority for the earth. The sustainability minor (within biology) offers a place for student engagement on campus and in the community. All students pay an annual "Green Energy Fee" (currently \$5 each semester) to a sustainability fund. This fund is overseen by a board of employees and students, and it offers a means for creative ideas and important resources, ranging from composting devices and electric vehicles for maintenance to solar-energy umbrellas for campus picnic tables and reusable mugs for students. The university has also taken the step of being a founding partner in the local Erie 2030 initiative, with the goal of decreasing the university's

overall footprint by 50% by the year 2030. The university is still gathering initial energy consumption data for this initiative.

The university green team, which is also a reporting committee within the university council, also engages in regular discussion and planning around issues ranging from recycling efforts to programs and events. One of the most dramatic recent indicators of the institution's unwavering, multi-disciplinary commitment to the Core Value of Global Responsibility—and the “external contexts” of the climate crisis and indigenous rights struggle—was the 2017 Sister Maura Smith Earth Day Lecture. In the fall 2016 History of the American West class, Brett Swan, a history and political science major, delivered a class presentation on the ongoing events on the Great Plains pertaining to the Dakota Access Pipeline (DAPL). The presentation inspired a conversation between Swan and the instructor, who also served as chair of the university Green Team, about their mutual desire to focus the attention of the university community on the struggle to stop DAPL, a critically important environmental justice/indigenous human rights/climate change-related story. With financial support from the Office for Academic Affairs and the Student Sustainability Fund, the Green Team brought Tara Houska, a Couchiching First Nation tribal rights attorney who had been deeply involved in the DAPL struggle, to Mercyhurst to serve as the Sister Maura Smith Earth Day keynote lecturer for our 2017 Earth Day celebration. The event brought an overflow crowd to the Taylor Little Theatre—an estimated 260 persons, with many attendees coming from nearby Seneca Nation.

Reflective of the **Critical Concern for Racism**, the university community also takes seriously its commitment to diversity and inclusion. In 2016 President Victor created a task force which listened to community members to learn perceptions about and experiences of racially diverse students and employees. Several positive things emerged from that task force, including #YouAreWelcomeHere campaign that featured a widely circulated video. The second iteration of that video was released in the summer of 2020. The university engaged in an impactful “expect respect” poster campaign. The university has also introduced a variety of trainings, including a New Employee Orientation. Establishment of Mercyhurst Office of Equity, Inclusion, and Justice (2020) In response to the national racial reckoning that followed the murder of George Floyd, Mercyhurst University established an Office for Equity, Inclusion and Justice to elevate our commitment to confronting racism and advancing racial justice. An impressive September 2020 “Mercy March for Black Lives” event sponsored by student leaders, gathered hundreds of students for education and advocacy. Following the hiring of a part-time (for now) officer to coordinate our work (Sister Natalie Rossi, RSM), a range of initiatives followed, including a concerted effort to have faculty (through the Center for Teaching Excellence) and *all* employees adopt a common discourse of antiracism and white privilege; a continuing series of brief reflections on racism in the Morning Buzz; and planning of more intensive trainings and discussions for AY 2020-21. The July 2020 Action Plan for Equity, Inclusion and Justice also offers clear evidence of the university's commitment to maintaining a culture that actively promotes and supports diversity.

Reflective of the **Critical Concern for Immigration**, The October 2019 Week of programming entitled “I Stand With Immigrants” featured active and passive programming, and was highlighted by President Victor adding Mercyhurst University to the President’s Alliance for Immigration in Higher Education for higher level policy advocacy for international student populations. National Week of Solidarity with Immigrants and Refugees was held on Oct. 21-25, 2019. In recognition of the Sisters' of Mercy critical concern for immigrants, the Departments of World Languages, Applied Sociology and Social Work, and Catholic Studies, in conjunction with the Vice President for Mission, spearheaded a series of events in association with the October 21-25, 2019 National Week of Solidarity with Immigrants and Refugees. Events included speakers, films, webinars, and a culminating event in which exhibitors from the city of Erie joined in celebrating immigrant cultures and refugees, educating attendees in the ways they can support these communities.

Reflective of its commitment to the **Critical Concern of Nonviolence**: the university participated in “On the Move”—an Erie movement to mainstream Nonviolence (September 2017); and the Clothesline Project focused on domestic violence (October 2020). In September 2017, faculty and students participated in On the Move, a local initiative to mainstream nonviolence and to “foster a culture of peace free from war, poverty, climate crisis, and the epidemic of violence.” One of four contingents marching from various parts of the city, Mercyhurst marchers represented the theme of Environmental Safety and Public Health. In October 2020 (Domestic Violence Awareness Month), the Mercyhurst Bystander Intervention Committee, in collaboration with the Mercyhurst Empowerment and Prevention Project and the Pennsylvania “It’s On Us” Grant, staged a compelling display of “The Clothesline Project” to draw attention to the ongoing plague of domestic violence.

There are various institutes and departments on campus that contribute significantly to this connection to external contexts through the lens of mission and service. The Civic Institute is another university-affiliated resource that offers numerous supports to the local community through data-based research and supports for vulnerable populations. An example of a significant local initiative emerging from the institute is Unified Erie, which addresses the local criminal justice system in terms of resources for prevention, reduction and reentry. The Evelyn Lincoln Institute for Ethics and Society (ELIES) offers ongoing public lectures and panel discussions engaging various contemporary ethical topics, with particularly heightened, diverse programming in the past few years. As a unique service to the community, each year this institute partners with local Rotary members to invite local high school juniors to campus for a day-long conference of presentations and discussions about ethics.

The Department of Community Engagement (CE), which includes Service Learning, is comprised of Director Colin Hurley and Assistant Director, Bethany Woods, along with two graduate assistants and three part-time drivers who support ongoing service immersion opportunities. This program has grown significantly in scope over the past few years. In addition to the herculean task of managing community partner relations and logistics for the Beyond the Gates

initiative, this office works with individual faculty and departments to support community-engaged learning. It also offers service fair and programming to support year of service programs like the Mercy Volunteer Corps. CE also helps to coordinate alternative breaks trips, such as annual Habitat for Humanity (housed under Campus Ministry), spring break urban immersion trips, an immersion in-country course to Guyana (partnership with Campus Ministry and social work), and a Mexico medical-based spring break trip. Another effort coordinated by CE is Trash to Treasure, an annual year-end effort to collect unwanted food, clothing and household items from students in order to donate them to local agencies.

A meaningful way to assess the ways in which the core values and critical concerns make a meaningful impact is through service following graduation. The office of Service-Learning and Community Engagement provides a Post-Graduate Service Fair, which started in 2012. The fair provides national and international organizations for students to explore programs after graduating that offer a year or more of service. On average between 40 and 60 students have participated. Due to Covid-19, this year's fair will be held virtually. The coordinator of the fair partnered with the Career Development Center to start capturing statistics on how many students participate in a year of service upon graduation. The First Destination Survey, offered by the Career Development Center, is offered yearly as of 2017. This senior survey gathers information about what our students do after graduation and provides us with job/education location, salary information, and some information about their experience with internships while at Mercyhurst. The information we gather is used for national reporting for the institution as well as for accreditation efforts for individual departments.

The FSAT Guyana course provides students with the opportunity to gain a better understanding of the cultural, political, economic and social realities in Guyana. This trips has goals to: explore social services provided to various populations in Georgetown; gain awareness of some of the challenges faced in the provision of quality services; gain knowledge and skills regarding effective interactions with different cultures; and to expose students (through a text about Cambodia) to analyze the circumstances encountered by some impoverished individuals in Cambodia and assess any parallels to what they observe in Guyana; and contemplating the question: What is our role as global citizens?

Of the 10 students who participated in the trip in January 2015, 3 graduates chose a year of service: 2 with AmeriCorps\*VISTA and one with the Mercy Volunteer Corps. From the January 2016 trip, four of the twelve did a year of service and two studied in a service-based master's program. One graduate went into the Peace Corps, two graduates to AmeriCorps\*VISTA, and one graduate served with the Mercy Volunteer Corps. Another student from that trip went to graduate school with the Notre Dame ECHO program that includes two service placements during the two years while studying for a master's in theology degree. And one other student received a graduate assistantship with the University of Michigan that incorporated a service

component in the inner-city of Detroit. There are other students who have chosen careers and found ways to continue embracing what it means to be a global citizen.

Further evidence of students grasping the mission of our institution can be noted through their commitment to a year or more of service upon graduating. From 2017-2019, the First Destination Survey—offered through Handshake from Career Services-- revealed that 3% of 18.5% who responded out of the senior class chose a career path in the form of service. Additionally, the Guyana FSAT courses demonstrate a high integration of learning and action with their commitments to service. The 2015 course had 30% of the participants chose to serve afterwards with AmeriCorps\*VISTA and Mercy Volunteer Corps. The 2016 course had 50% of its students serve through the aforementioned organizations, Peace Corps and two service-based master's programs at the University of Michigan and Notre Dame.

### **Summary of compliance:**

We find extensive evidence that the mission, core values and critical concerns address both internal contexts and constituencies at the university, most notably in academics and within key departments such as Community Engagement. For example, the extensive information collected from the Hafenmaier College of Humanities, Arts and Social Sciences for 13 departments during the calendar year 2019 demonstrates that each core value and critical concern was addressed at least several times (for some well into the dozens) during that year. The experiences students gain through service, beginning with the freshman year service experience and into the critical reflection on experience that takes place in the OutREACH and Senior Ethics Capstone experiences, ensure that students indeed experience deepening immersion in the university's core value as an ambassador of service.

Some areas are in need of continual improvement and refinement, such as the university's ongoing work in the areas of equity, inclusion and justice. There was once a full-time sustainability coordinator, which then moved to part-time. This part-time position is vacant now. While many students and employees of good will work together on sustainability efforts, the sustainability area, which moved under mission last year, would benefit from more strategic planning in the area of environmental sustainability, particularly regarding the hopes and ideas of current students and regarding the future leadership structure for this area.

Most student life areas and campus ministry offer evidence of regular evaluations to continually revise and update programming. Athletics has some teams with strong evaluative processes in place, such as volleyball and field hockey. Forms of evaluation vary from team to team, ranging from weekly verbal feedback to regular or periodic written evaluations. Overall, it appears in

talking with athletics administration that the department lacks a formal process for evaluation of how the mission is evaluated within individual teams.

The university wishes it could offer more extensive service and immersion experiences, especially international experiences, but limits in staffing and scholarship support for students make this difficult. As the Community Engagement program matures, the university is beginning explorations of the benefits or drawbacks of seeking the Carnegie Classification for Community Engagement. The process of conducting a self-study of this sort could be helpful, especially for bringing together the many people who are doing daily work on behalf of the mission and CST, and who often are unaware of the scope of what others are doing.

It is noteworthy that while we find extensive evidence of programs and events for supporting students on campus and connecting students and employees to concerns external to campus, we find that many of these programs take place without gathering evaluative feedback to know to what extent they were impactful or successful. In other words, we can say without question that the mission and core values significantly shape the ways in which the campus envisions its programming and its overall culture; however, we are less confident that we know with certainty what impact these programs actually have on the lives of our students.



**Standard: I-1c: clearly defined mission and goals that are approved and supported by the governing body**

**Potential evidence:**

*Mission, Vision and Core Values*

*Board of Trustees Meeting Minutes Winter 2018-Winter 2020*

*Board of Trustees Mission Subcommittee Minutes October 2020 (Unapproved)*

*Mercyhurst Team Report\_Draft for Final Review\_Suggested Revisions*

**Summary of evidence:**

The current mission and vision statements were formally approved by the Board of Trustees in 2007. The mission and vision statements were last formally reviewed by the Board of Trustees subcommittee on mission in 2012 when the college became a university. The charter of the mission committee is approved annually. This charter states that this committee will review the Mission statement every three to five years to ensure that its language remains current and its format is consistent with similar documents. This charter states that the subcommittee on mission will support the articulation of the Mission Statement to the various publics included in the Mercyhurst University community, i.e., the students, board of trustees, faculty, administration and staff and Assist in the interpretation of the Mission Statement of Mercyhurst University and its Core Values as adopted (2007). The Mission Subcommittee meets prior to each full board meeting (an exception was spring 2020 when not all subcommittees met due to the Covid-19 pandemic) and minutes are recorded from each session. Highlights from the mission subcommittee meetings are brought forward for discussion with the full board.

There is substantial evidence that the Board not only approves the mission and goals of the university, but also support them. The Conference for Mercy Higher Education Mission Self-Study Peer review team offered the following feedback amidst its commendations: “It is clear that members of the Board of Trustees are ambassadors for the University. Their excitement about mission at Mercyhurst is contagious. Their enthusiasm is matched by people we met at every level of staff, faculty, and students; clearly the university community has developed a strong emphasis on the formation of authentic relationships as a hallmark of Mercy education. The Board’s attention to mission will only deepen as the Emissary Program is extended to trustees.”

At the June 2017 Mission Subcommittee Meeting a discussion about strategic planning led to the creation of two new practices. The first is to ensure that a card with the mission, vision and core values is at each trustee’s place setting for the full board meeting as a visible reminder of

these foundational documents throughout the discussion and planning. Secondly, the discussion at the meeting led to the new practice of generating discussion at the end of each full board meetings about how the meeting's deliberations reflect the mission and core values. The Fall 2020 Board of Trustees Mission Committee minutes reflect a discussion of a new series of board educational/reflective materials provided through the Conference for Higher Education. This discussion led to commitments to incorporate mission reflective components at the beginning of each full board meeting, using a combination of resources from the Conference for Mercy Higher Education and the university's own Mercy Emissary training resources.

The Board of Trustees also supports the university's mission and goals through its ongoing efforts to know the needs and concerns of students. The bylaws for the Board of Trustees state that the president of Mercyhurst student government serves as a Trustee and a full member of the board. This student representative also served on the Subcommittee for Mission each year. Additionally, the board has a current practice of facilitating direct dialogue between Trustees and students, as evidenced by the February 15, 2020 board meeting, which concluding with a Trustee-student lunch mixer that placed approximately 25 student leaders from various positions on campus around lunch tables with a mixture of trustees and cabinet members.

### **Summary of compliance:**

The Mission and Vision Statements were appropriately reviewed and approved when the new versions were drafted in 2006, and when they were revised to reflect the change to university status in 2012. During the October 6, 2020 Board of Trustees Mission Subcommittee Meeting, the board discussed the fact that we do not have in place a clear schedule for reviewing the University's Mission and Vision statements.

There is a deficit in terms of evidence that the Board has adequately assessed the effectiveness of its support of the mission. Some information about the effects of the mission can be found in the 2020 Employee Mission Survey, which was initiated by the VP for mission. Student experiences and understanding of mission can be partially analyzed through initial analysis of the REACH curriculum through its Chalk & Wire system for longitudinal assessment. Beyond these, there is insufficient evidence that the governing body itself initiates efforts to assess and analyze either quantitative or qualitative information about its own mission. More information will be needed before the next formal review and approval of the mission, vision and core values.

**Standard: I-1d: clearly defined mission and goals that guide faculty, administration, staff, and governing structures in making decisions related to planning, resource allocation, program and curricular development, and the definition of institutional and educational outcomes**

**Potential evidence:**

*Planning:*

*Campus Ministry Department Assessment 2018*

*5 Year Self-Study Report: History*

*Interior Design & Architecture Department Assessment 2018*

*5Year Self-Study Reports: Public Health, Interior Design.*

*Resource Allocation:*

*Annual Budget Request for Additional Funding – Capital*

*Annual Budget Request for Additional Funding – Form Usage Instructions*

*Request for Additional Funding – Campus Ministry (2014)*

*Faculty Handbook*

*Program and Curricular Development:*

*Mercyhurst University Strategic Plan “Renewal Through the Mercy Mission, Fiscal Years 2018-2020”*

*“Renewal Through the Mercy Mission Fiscal Years 2018-2020, Mercyhurst University Strategic Plan Update” February 1, 2020.*

*William C. Sennett Institute for Mercy and Catholic Studies*

*MIAC October 2020 Event:*

*Evelyn Lincoln Institute for Ethics and Society (ELIES)*

*2020-08-24 - Division of Enrollment - Division-Wide Meeting*

*2018-06-06 - PRESENTATION - Erie Recruitment Retreat for Fall 2019 - Outcomes*

*Definition of Institutional Outcomes:*

*Strategic Plan Update*

*Employee Mission Survey 2020*

*The National Survey of Student Engagement (NSEE)*

*Definition of Educational Outcomes:*

*Assessment Handbook*

*FYE Purpose Statement and Goals (iMU)*

**Summary of evidence:**

Mercyhurst University has an established mission, vision, core values and critical concerns (from the Sisters of Mercy) reflective of the Catholic and Mercy heritage inherent in the mission, to guide the Mercyhurst community in all decisions in four areas: planning; allocation of fiscal, personnel and physical resources; curricular development; and program development for student-related learning and for administrative supports. The mission guides how the institution defines its outcomes, both for student success and financial assets.

The University conducts periodic strategic plans to advance its goals. The most recent plan, 2018-2020 provided the blueprint for widespread improvements in four overarching goals. This blueprint of overarching goals and strategic goals was the guiding impetus for faculty, administration and staff, and the governing Board of Trustees in their decision-making as they advanced their respective goals. The Strategic Plan Update in February 2020 indicated the outcomes with a high degree of progress.

**Planning, Resource Allocation, Curriculum Development, and Defining Outcomes**

Faculty, led by chairs of all academic departments within four Colleges, closely follow the mission as they conduct their planning. Every five years, faculty and chairs of academic departments (as stipulated in the 2019 Assessment Handbook, page 14) are asked to self-assess, and as part of this process to identify how departments align and contribute to the university's mission. Through Self-Study Assessment Reports, each academic department at Mercyhurst engages in a rigorous course of assessment of its program. These are clearly reported indicators of the mission-conscious nature of the academic enterprise at Mercyhurst.

In turn, faculty, with their chair, evaluate the efficacy of curriculum and faculty in fulfilling Student Learning Outcomes (SLOs) and turning out graduates prepared for their respective professional fields. The ongoing assessment moves through a five-year rotating regimen of SLO evaluation, with particular courses methodically selected to evaluate each learning outcome (e.g., Critical Thinking, Communication Skills). The regimen culminates every five years in a thorough overall program self-study that includes analysis of the SLO data, program review by an outside peer evaluator, alumni and current student data, shifting trends in the discipline, analysis of faculty scholarship, collaborative partnerships with other academic entities on campus as well as with organizations in the community, and consideration of the department's mission and its alignment with university mission, based on the philosophy and values of their discipline.

This analysis of mission and institutional goals then guides faculty and chairs in decision-making for future goals in the department and classroom: in requesting and allocating departmental budgets; personnel needs; and goals for curricular development and learning outcomes. The Assessment Handbook (page 3) calls for aligning student learning outcomes to Mercyhurst's Mission, Core Values, and Strategic Goals helps to strengthen our institutional identity and

articulate to internal and external stakeholders the unique value of a Mercyhurst education. Resource allocation by departmental Chairs are led by these five-year goals; however, the budget process is not for long-range planning. Budgets are prepared annually by chairs; faculty and chairs typically do not know until the start of the new fiscal year if they will receive any new operational money.

This excerpt from the Thomas B. Hagen Department of History self-study demonstrates how the mission is imbued in one academic department. Mission is: “inextricably bound to the University Mission” through the critical concerns of the Sisters of Mercy, evident in course instruction and in the ongoing community service projects and student scholarship that we cultivate. History faculty and students have played a critical role in university initiatives such as the university environmental sustainability program, and multi-disciplinary academic program initiatives on issues of race, the welfare of children, genocide, and the health of our democracy. “Further, our students, particularly those enrolled in the Public History program, frequently engage in experiential learning opportunities in the community that intersect with and advance the Mercyhurst Mission’s “commitment to serving others.” Our Public History students perform invaluable volunteer service and complete internships at local all-volunteer museums and historic sites, historical organizations, or often through neighborhood and community organizations. Their oral history projects, walking and driving tours, and a museum photography exhibition centered on the rich history and cultures of Erie’s underserved neighborhoods and New American refugee communities... “in service toward a just world.”

This analysis of alignment with Mission and service-orientation is repeated by most other departments. Other sections of Standard 1 also provide ample evidence of mission being used in curricular development, teaching practices and learning objectives.

Faculty and departmental use of mission and goals for guidance is strengthened by the entire body of faculty, the Faculty Senate. This is a significant body for making recommendations to the university’s President. Minutes dating back a full decade, to 2010, reflect matters directly concerned with Mission, and directly related to goals, which are regularly reviewed and discussed at Senate Meetings. Faculty Senate Meeting agendas and meeting minutes are posted on the Faculty Senate Blackboard page. It is important to note that although the Senate is a recommending body within the governance structure of the university, faculty members generally view it as an effective vehicle for expressing their collective voice on institutional goals affecting academic life, policies, and general direction of the university.

## **Mission that Guides that guides Administration Decision-making**

### *In Planning*

The mission certainly has guided the President, the cabinet of Vice Presidents, and academic Deans in their decision-making in creating the current Strategic Plan. This is well-supported by an established cabinet-level Vice President for mission position charged to integrate the mission at all levels within the university and to the entire Mercyhurst community of students, faculty and administration. The Vice President for Academic Affairs is charged with upholding the Mission within Program and Curricular Development, and the Vice President for Strategic Initiatives does the same, as evidenced in the current strategic plan.

### *In curricular and program development*

Significant evidence for using the mission in decision-making can be found in the newly-established REACH curriculum. In 2016, Mercyhurst University adopted a new general education curriculum: REACH. The REACH curriculum is designed to expose students to a variety of courses and experiences central to the liberal arts. The REACH courses also provide students with opportunities to meet university-wide learning outcomes, including: challenging mindsets and assumptions; developing critical thinking and problem-solving skills; encouraging curiosity and creative inquiry; cultivating an appreciation of arts and culture; and igniting community awareness and engagement.

### *In creation of the iMU course*

Another example of mission-guided curricular planning is the development of the iMU (Introduction to Mercyhurst University) course. The process began with a robust team of faculty and administrators who began the planning process by establishing this First Year Experience Purpose Statement and Goals (2015): “The purpose of the FYE course at Mercyhurst University is to mentor first-year students as they transition to college learning and the student experience.” This planning team established the following goals before establishing teams to begin working on specific content areas and content for course modules. The FYE course: (1) Provides critical skills, foundational knowledge and awareness needed for academic success; (2) Fosters engaging, deepening relationships between first-time students and the Mercyhurst community; (3) Invites a deep appreciation for liberal, experiential learning; and (4) Inspires responsibility for others and care for body, mind and spirit.

This foundation led to the creation of a 2-credit iMU course (in two sections) that grounds students in the history and mission of the university; in key skills for diversity and inclusion; in preparedness for taking full advantage of various campus resources; in self-awareness in terms of mind, body and spirit, service; and many other mission-grounded themes and priorities.

### *In resource allocation*

In terms of resource allocation, we acknowledge a lack of helpful supportive evidence. While final major decisions about resource allocation are made primarily at the cabinet-level and these members will be acknowledged how the mission and strategic goals factor into decision-making, it is difficult to substantiate how major decisions connect to mission. This includes decisions related to building and grounds, major projects and the overall university budgetary decisions.

### *In governance structures*

The President's Cabinet meets weekly and manages the ongoing operation of the university. Each VP oversees various departments and individuals with varied processes for planning

It is significant in terms of the university's commitment to mission that the VP for Mission serves on this cabinet and meets biweekly with the President. The Vice President for Mission, along with all Vice Presidents, offers a weekly report at cabinet meetings (see sample from 11-18-20 Cabinet Meeting). The model ensures that a mission-sensitive perspective is brought into major decisions for issues such as personnel and budgeting. The VP for Mission supports two departments in advancing the mission through five-year assessment processes: Campus Ministry and Community Engagement. The Vice President also supports two broad mission-centered strategic initiatives: Sustainability and the Equity, Inclusion and Justice Initiative. Each of these areas utilize lead officers supported by committees that conduct ongoing planning and goal setting.

As another example, The Vice President for Academic Affairs is guided by the mission for curricular outcomes and makes those decisions for 14 offices. At least six of them submit five-year Self-Study reports that review their department mission in alignment with university mission, and guides their programmatic goals: Library, Registrar, Academic Support and Writing Center, Distance Learning, Career Services, and Learning Differences. The Vice President for Student Life also uses the mission in decision-making for 11 offices, and five submit five-year self-study reports: Residence Life, Police and Safety, Athletic Administration, AIM office and the Multi-cultural Center (within the Campus Involvement Center). The Counseling and Health Center and ROTC are examples of offices who do not complete such reports.

While Vice President for Enrollment oversees the Division of Enrollment, which does not participate in 5-year assessment processes like some areas, it has developed its own rigorous process for annual goal setting based on ongoing data collection and strategic priorities of the university. Some goals clearly align with mission-centered goals for the university, such as two of its AY 17-18 goals. One goal was to build the university's reputation in the Erie region and the Erie Catholic Diocese (resulting in a "Living the 4<sup>th</sup> Vow" luncheon for leaders within the Erie Diocese). A second goal was to make deliberate changes to the student Ambassador Program procedures to solicit diverse pledges. The division reviews its previous year's goals and sets the goals for the coming year at an annual division retreat (see sample from 8-24-20 retreat). Each individual department director within the division also sets and regularly reviews annual goals.

The University Council Bylaws include a shared governance model that demonstrates how this council offers recommendations to the President and to the Board of Trustees and gathers recommendations from three distinct bodies: Faculty Senate and its various Standing Committees, Staff Senate and its various Standing Committees, and Student Government and its various Standing Committees. This university council, which meets at least twice each semester according to its bylaws, offers an important conduit of information, sharing concerns from various university constituents with the President's cabinet and the Board of Trustees. The bulk of the work takes place in the faculty senate subcommittees, many which have a very explicit connection to the university's mission and core values: Administrative Policies, Campus Life, Diversity, Inclusion and Gender (being renamed Equity, Inclusion and Justice), Green Team, Intercollegiate Athletics, Library & Distance Learning and Mission.

### *In programming beyond the curriculum*

The mission statement for the Mercyhurst Institute for Arts & Culture (MIAC) states that it strengthens the vibrancy of the Erie region by presenting world-class performing arts experiences that lift the spirit, galvanize the intellect, stimulate the imagination and encourage the free exchange of ideas. By making these programs available and accessible to the broadest possible audience, the Institute strives to create an environment of richly varied, inclusive cultural experiences." Within annual planning for this area, careful attention is paid to the core values and critical concerns. Amidst Covid-19, Brett Johnson, Artistic Director of MIAC, was forced to abandon plans for in-person events. Wanting to offer virtual events that connected to current strategic goals of the university, Johnson reached out to multiple faculty members to assess their interest in artists he was pursuing in hopes that the programs would supplement learning happening in various courses. On October 11, 2020 MIAC hosted a free Zoom webinar featuring a performance by three-time Grammy Award-winning musician and humanitarian Angélique Kidjo. In a July 2020 email to the Provost and Vice President for Mission, Johnson noted that he was pursuing two different artists connected to racial/human rights issues and stated that "I'm excited by the prospect of incorporating these speakers into our MIAC lineup. They align with our MIAC brand (they're both well-regarded artist/activists who can speak thoughtfully and eloquently about current topics), with our university's core values, and with the [university's diversity initiatives]."

The William C. Sennett Institute for Mercy & Catholic Studies includes an innovative effort to enhance both the mission and Catholic identity of Mercyhurst University. To this end, it highlights the breadth and depth of the Catholic intellectual tradition, as well as the five critical concerns of the Sisters of Mercy. This Institute hosts an annual fall lecture addressing significant topics in Catholic theology and thought and hosts a biannual spring lecture featuring Mercyhurst alumnae Sr. Joan Chittister, OSB and a conversation partner. The Institute (whose endowed chair position remains vacant due to retirement in May 2020 and difficulty filling the position amidst Covid-19) offers clear evidence that the university's core values guide its programming. Its most recent lecture (Fall 2020 lecture postponed due to Covid-19) focused on



the critical concern of immigration: “Wounded Grace and the Vulnerable Among Us” by Dr. Cecelia Gonzalez on September 26, 2019. A look back at fall lectures since 2010 shows that each critical concern has been creatively engaged through these public lectures that draw a combination of students, employees and members of the local and regional community.

The Evelyn Lincoln Institute for Ethics and Society (ELIES) provides information about current challenges facing our local and global communities, opportunities for development of ethical sensitivity and innovative strategies for dealing with ethical problems and conflicts. These issues are addressed through lectures, symposia, and round tables. A quick perusal of the website shows an impressive array of ongoing events. These programs not only align with the core values, but also the critical concerns of the Sisters of Mercy. This includes programs dealing with earth, nonviolence, and racism within the past two years. ELIES provides formal and informal programs throughout the academic year as well as spontaneous programs in response to current events. The fall 2020 feature was chosen to align with the current goals of the university regarding Equity, Inclusion and Justice: “Invisible Indians in the Age of Diversity” On December 1, 2020. Edward A. Jolie, Ph.D., RPA, of the Mercyhurst University Department of Anthropology/Archaeology gave a presentation regarding the status of Native Americans in the landscape of today's America.

#### *In Administrative Resource Decisions*

We can offer a couple examples of the mission’s centrality in major decisions regarding budgeting and resources. The last time that raises were given to employees (2017), the administration chose a tiered approach that gave the highest-percentage raises to employees who make the least money. The university’s mission and the Catholic social teaching principle of the preferential option for the poor was at the forefront amidst this decision.

Budget directors are free to make adjustments within existing operational budgets; however, all forms requesting additional resources include a section to demonstrate how these requests support the mission and the strategic plan. The President’s Cabinet serves as the ultimate budget and finance team to review all requests for new positions and additional operational expenditures at the university. Standard annual budgetary request documents show that for all new requests, “Regardless of the form, all requests should include information related to how much of the request will be covered by department/division resources and how the expenditure supports the University’s Mission and Strategic Plan, enhances revenues, and/or reduces expenses.” This language is found in 2018 and 2019 forms. We have not found evidence that there is any follow-up to show if new budgetary requests actually do support the mission and the strategic plan.

#### *In Student Support Areas*

Many student support services on campus participate in thorough five-year self-studies. As its mission statement claims, “Mercyhurst University campus ministry creates a hospitable environment and a locus for spiritual development of the entire university community. Grounded in our Catholic identity and Mercy tradition, we support all faith traditions, foster holistic, communal development, and nurture transformative discipleship focused in service and justice.” Campus Ministry’s 2018 Student Services Assessment shows extensive analysis: (1) to look at the current ministry staffing levels at a dozen similar Catholic colleges and universities, and (2) to gather and analyze data about programming and priorities from 8 key comparable Catholic institutions. The self-study also notes the steady increase in students struggling with anxiety and depression as an urgent reason for maintaining current staffing levels. This process assisted in establishing a plan for continued staffing as the director was named VP for mission. The university named its chaplain as interim director, allowing us to hire a young, energetic Catholic lay minister for programming to support ongoing goals for the department while offering continued pastoral presence to students. As the self-study notes, “Through our assessment over the past several years, we have monitored how programs move from welcoming students to deeper reflection and integration of faith into daily life.” This reaffirmed the need to continue to support key programs, such as Carpe Diem retreats and Wednesday night fellowship while identifying a need to revisit programs involving bible study and service/immersion opportunities.

*Mission that Guides Board of Trustees Decision-making in Planning, Resource Allocation, Program and Curricular Development, and Defining Outcomes*

The Board of Trustees serves as the ultimate body for oversight and governance of the university, and the institution's mission, vision statement, core values and Mercy heritage strongly guides the Board by-laws and seven committees throughout its decision-making for planning, resource allocation, and defining the direction and outcomes of the university. The Bylaws for the Board of Trustees lists as its first responsibility to “determine and periodically review the University’s mission and purpose”. The Board underscores this commitment by the Board structure and mandate of the committees. The Board Committee Charters FY2019-20 for two committees, Mission and Academic Affairs, specify they are directly responsible to ensure that institutional goals are consistent with mission and are aligned.

Seven other board committees explicitly have an obligation to be guided by the Mission: Budget and Finance, Advancement, Building and Grounds, compensation, Endowments and Investments, Executive (with oversight of strategic planning process) and Governance. The Mission of the Budget and Finance committee, for example, "provides oversight related to the fiscal stability and long-term financial health of Mercyhurst University to ensure the institution's ability to fulfill its mission and strategic goals." Their activities are reported in Board minutes (winter 2018 – Winter 2020).

Among the Board of Trustees' subcommittees is the Subcommittee for Mission. Not only do all incoming Trustees serve on this committee during their first year at the university, but this body also serves in the important role of ensuring that the mission is being accomplished, as an institutional outcome. The minutes for the subcommittee on mission reflect that for each fall meeting (typically in early October) the mission subcommittee reviews and approves its charter, which includes a periodic review of the mission and vision statement of the university. As the minutes from full board meetings from 2018-2020 reflect, it is the board's regular practice to conclude each meeting with a discussion of how that meeting's agenda items and the discussions that unfolded reflect the mission and core values of the university.

Mission-informed decision-making is shown in changes to the Board itself. The meeting minutes from October 6, 2020 reflect that during this meeting the Mission subcommittee discussed the university's new covenantal agreement with the Conference for Mercy Higher Education and resultant changes to the university's bylaws and articles of incorporation. This body is also specifically charged with periodically reviewing the university's mission and vision statements and core values.

The Board of Trustees Subcommittee on Mission engages in important discussions regarding faithfulness to religious sponsorship and closely monitors (along with the Subcommittee for Governance) the university's relationship with the Conference for Mercy Higher Education. The Conference for Mercy Higher Education (CMHE) oversees the 17 colleges and universities affiliated with the Sisters of Mercy. The CMHE has recently adopted a new covenantal agreement to be signed by each university president and board chair. The CMHE has also updated new language for all CMHE-affiliated university bylaws and affiliation agreements. During the October 17, 2020 Board Meeting, the Board of Trustees approved these changes to the university bylaws, and offered updates regarding the upcoming signing of the covenant. The Board was also updated on the October 2020 virtual mission peer review self-study and site visit, which is another essential component of the covenantal relationship between the university and the CMHE. Trustees reviewed the full self-study report in March 2020 and were involved in multiple meetings during the October 2020 visit.

*Goals that Guide Board of Trustees Decision-making in Planning, Resource Allocation, Program and Curricular Development, and Defining Outcomes*

The Board of Trustees, and their Committees, recently made key mission-informed decisions for the direction of the institution, which led to the Mercyhurst University Strategic Plan, "Renewal Through the Mercy Mission, Fiscal Years 2018-2020". The very title of the current strategic plan points to adherence to the institutional mission in planning. The plan set the direction for administration to pursue four over-arching goals: "Renew Our Commitment to a Mercyhurst Education", "Renew Our Commitment to Campus Life", "Renew the University's Resources, Processes and Infrastructure" and "Renew the Mercyhurst North East Vision."

Most significantly, Board decisions led to planning resulting in the closing of the North East campus; re-affirmed the Mission and Vision Statement commitment to the liberal arts and professional and career-path programs like the new cyber-security programs and building of its lab; initiated a capital campaign for athletic facilities; and spurred the building of a new residence hall and a significant renovations of the library and main dining hall.

In addition to guiding planning, the mission and goals were at the forefront of decision-making by the Board of Trustees for resource allocation, primarily through their Finance Committee. The decision to close the North East campus was made during deliberations during the implementation of the overall Strategic Plan's third and fourth goals concerning university resources (fiscal and personnel) and physical infrastructure of the North East campus, and to renew the North East vision. These goals were critically evaluated and determined to be unfeasible before a decision was made to instead merge the two campuses.

Mission-informed decision-making by the Trustees is reflected in changes to campus culture. At the October 6, 2020 meeting, the mission committee also discussed and offered guidance for the university's planning due to a recent White House executive order dealing with trainings related to diversity and antiracism. The advice given by the committee was invaluable for the university as it moves forward with strategic plans for equity, inclusion and justice, especially regarding antiracism trainings for students, employees and trustees.

The mission and goals are at the forefront of Board's committee mandate to define the University's institutional outcomes. Minutes are kept for all full board and board subcommittee meetings are shared with all board and cabinet members. As a body for support and oversight, it is unclear if the Board and its individual committee establishes its own formal outcomes. An example of a functional outcome is the subcommittee for Governance and ongoing discussions in AY 2019 and 2020 regarding establishing a process for board members to self-assess their performance on the board.

### **Summary of Compliance:**

There is ample evidence that the mission and goals of this university guide decision-making at all levels: faculty, administration, staff and trustees.

Faculty clearly integrate mission to meet academic goals, while adhering to its Mercy heritage, particularly in the critical concerns of the Sisters of Mercy, and Mercy mission of service. The curricular efforts to specifically incorporate the mission throughout the four-year span is most notable. The university uses the mission to define its outcomes for the higher educational institution for excellence in the liberal arts, professional and career-path programs while balancing financial institutional goals.

How the mission and goals guide decision-making to define its academic and administrative goals are unknown to this author. Beyond Trustee and Cabinet-level development of the strategic plan, this author is not aware of the how the administration uses mission and goals to define overall institutional goals or outcomes from all strategic objectives, and then plans for growth and innovation.

It is noteworthy that members of this work group aside from the cabinet level position express very little awareness of how resource and budgetary decisions are made at upper levels of the university. While there are clear processes for submitting annual budgets or requesting new funds, after these forms are submitted there is not enough communication down the chain of command to help employees to understand what decisions have been made regarding budgeting and resources and, more importantly, why these decisions were made. New mechanism for transparency and communication are warranted.

As we survey the various administrative and support offices in the university, it becomes clear that there is not a uniform method for planning and assessment across all areas. In comparison to clear self-study processes in academic areas that are readily available, it takes considerably more work to identify the planning processes in many administrative and support areas. While a deeper investigation shows that most areas do have processes in place for annual and long-range planning, the university would benefit from more uniform practices and measures.

As noted elsewhere in this report, it has been more than five years (2012) since the Board of Trustees last formally evaluated the mission, vision and core values, even though the Mission Subcommittee's bylaws state that it will review these every three to five years. New structures will need to be put in place at the Board and cabinet levels to ensure that these are reviewed with the appropriate frequency. As the executive summary of the October 6, 2020 Board of Trustees Mission Subcommittee meetings reflects, this committee discussed that it is aware of this deficit and is putting mechanisms in place for predictably reviewing these foundational documents. A more rigorous system of accountability should be put into place to ensure that the mission is reviewed every 3-5 years as stated. Even if these statements remain unchanged, the process of generating discussion about these foundational documents at the highest levels of governance is strategically valuable. This could be directed by the Vice President for Mission Integration, who then shares important results from the review with the campus community.





Professional development of scholarly and creative activities are supported administratively in three ways: funding, ongoing on-campus workshops through the Center for Teaching Excellence, and Professional Development Days at the start of the semester.

Faculty Development funding was re-organized after AY2016 for faculty of all four colleges to attend conferences and contribute to their teaching, research and professional growth. All have funds for research at the discretion of the deans. The colleges may differ in ways to support research efforts. In Hafenmaier College of Humanities, Arts and Social Sciences, a diverse faculty-led committee approves funds to allow an average of 27 faculty to travel to conferences and workshops annually as presenters and attendees. Some funds for student research are also available, through small grants.

The Center for Teaching Excellence holds regular workshops for faculty teaching. In FY21, the new Center director is hosting online workshops to improve teaching skills and creative use of technology that are increasingly important with COVID-19 remote teaching. In FY 21, the director has also teamed with the Evelyn Lincoln Institute for Ethics and Society to create a series of trainings on antiracism and classroom pedagogy.

### **Faculty Development Days**

Faculty Development Days are held annually at the start of the academic year to provide opportunities for best practices in teaching, pedagogy, student-focused scholarship and service. These are faculty-led workshops.

Notable for mission and goals is a recent workshop on Mission-centered learning at Faculty Development Days: “Living the Legacy: Integrating the Mercy Mission into Courses Across the Curriculum” (August 2019). Professors from Public Health and History led a discussion of how faculty advance Mission-centered, Core-Values-conscious learning—in REACH courses, in elective offerings, and through capstone experiences. REACH projects worked with agencies for a homeless census in Erie, and Teen Parenting Program; and led classroom simulations for refugee and homeless populations. Capstone projects, such as the Public History program’s *You Are Here, We Are Here*, partnership with the campus Office of Community of Engagement and the Sisters of St. Joseph Neighborhood Network, developed a multi-faceted community history project on Erie’s underserved but culturally rich Eastside. Another is *A Shared Heritage: African Americans in Erie County—A Driving and Digital Tour*, collaboration of faculty and students of Public History and Graphic Arts and Computer Design, creating a brochure and website documenting the history of African Americans in Erie County from slavery to the contemporary era.

### **Five-Year Self Study Reports by all Departments Illustrate support of Mercy Mission**

The Five-year Study reports by each academic department rigorously evaluate the efficacy of curriculum and faculty in fulfilling Student Learning Outcomes (SLOs). The examples below illustrate the faculty scholarship and collaborative partnerships with other departments and



offices and organizations in the community, and the department's mission alignment, and integration of the university Mission, into classroom learning, and activities outside the classroom.

### **Hafenmaier College of Humanities, Arts and Social Sciences - the Thomas B. Hagen Mercyhurst University History Department**

The mission of the History Department engages students in the rich and rewarding study of past human societies and cultures. Our program's mission is inextricably bound to the University Mission, to foster a learning environment where, "faith and reason flourish together, [and] where the beauty and power of the liberal arts" are fully realized. Indeed, the History Department holds sacred the core values of the university's mission. The department, in doing so, has compiled an exemplary record of civic engagement on contemporary issues of vital importance to our students and the future they will help shape. History faculty and students have played a critical role in university initiatives as the university environmental sustainability program, and multi-disciplinary academic program initiatives on issues of race, the welfare of children, genocide, and the health of our democracy.

The Public History program advances the Mercyhurst Mission's "commitment to serving others" and the nearly century-long Mercyhurst commitment to creating learning opportunities beyond our gates, "in service toward a just world." Recent examples include internships at local museums and historic sites, historical organizations, and community organizations. The Erie community benefits from student oral history projects, walking and driving tours, and a museum photography exhibition centered on the rich history and cultures of Erie's underserved neighborhoods and New American refugee communities. Capstone senior projects in Public History include: *A Shared Heritage: A History of African Americans in Erie County – a Driving and Digital Tour*; *Ridgway Cemetery Preservation Project, Hydetown, PA*; and *Home of the Brave: A Documentary History of the Erie, Pennsylvania Soldiers and Sailors Home*.

Faculty scholarship since 2015 include organizing Mercyhurst panel discussions on critically important issues in American life: voting rights, the role of civil disobedience in American life, and the removal of Confederate monuments. Faculty have delivered public talks, forged relationships with significant public history institutions such as the Robert H. Jackson Center, created an award-winning historically centered podcast, and published a nationally recognized article on the regional interpretation of environmental history. Most recently, faculty and students have become deeply invested in the issues surrounding the movement for racial justice in the United States, delivering multiple community presentations on the history of African Americans in Erie County from the days of slavery through the Civil Rights era.

### **Zurn College of Natural and Health Sciences—Public Health Department**

Consistent with the mission of Mercyhurst University, the Public Health Department seeks to educate students to be globally and socially responsible citizens who take intelligent actions to improve the lives and conditions of people around the world.

The Mercyhurst mission is infused in public health curriculum, with experiential learning infused into community engagement. Examples include a Social Determinants of Health course, partnering with the Office of Community Engagement to conduct surveys in homeless shelters, and experience the challenges of refugee resettlement. Other examples are: student-led needs assessments in one of Erie's low-income neighborhoods, training adolescent teen parents in the parenting program at an Erie high school; partnerships with Women, Infant and Children Program that provides services for low-income pregnant women and children until the age of 5; Erie County Health Department division of STIs (sexually transmitted infections); and Blue Zone project, for improved health outcomes in a rural town. Other recent projects were a food security program addressing food deserts in Erie, the annual international public health service trip and Public Health Club activities to improve campus life.

Many departments repeat these two examples of scholarly and creative endeavors to manifest the mission and goals. The Walker College Interior Design Department Report eloquently describes how their mission, goals and teaching philosophy, aligns professional goals with the university mission and "core dimensions of compassion, mercy, responsibility, intellectual excellence and service." Interior design students engage in academic and professional endeavors that endorse creative problem-solving approaches to a broad range of societal challenges both on and off campus, public and private.

Ridge College of Intelligence Studies and Applied Sciences Department of Social Work and Sociology note how the mission and core values of Mercyhurst are deeply imbued in their department's mission, curriculum, and extra- and co-curricular activities. Student classwork and service-learning take place in Erie city schools, service trips abroad, Washington, D.C. lobbying with social justice advocacy organizations, and projects addressing hunger in Erie. Classes have also produced a documentary film on the scourge of gun violence, and homelessness.

### **Collaboration with community partners for program development and funding: Leadership and Service to Others**

The Celebration of Scholars program during 2019 illustrates how our faculty collaborate with community partners through funded grants. Remarkably, in 2019, every grant awarded to Mercyhurst departments and faculty was directly related to our mission, core values and critical concerns: Education Department grants from R.B. Wiley Community Charter School, from Erie School District for Autism Support, from Pennsylvania Department of Education, the Erie School District and Northwestern School District for Carpe Diem and MELIA afterschool programming to impoverished children; and a Dance Department grant from Erie Arts and Culture. State and national grants include Biology Department grants with the Pennsylvania Department of Conservation and Natural Resources, and National Science Foundation.

Our faculty are leaders in service, at local, state and national levels. Faculty serve on boards of directors of non-profit organizations like Harborcreek Youth Services (Criminal Justice faculty); Preservation Erie (which History faculty also co-founded); Lake Erie Region Conservancy (Biology); anti-graffiti efforts of the city of Erie (Intelligence Studies). Their expertise contributes greatly to Erie's community improvement, e.g., United Way of Erie County action plan for grade level reading (Education).

Faculty also serve at the state level as officers for the Pennsylvania Historical Association and Western Pennsylvania Undergraduate Psychological Consortium. At the national level, they serve as editors of journals, as a subject matter expert for juvenile justice system, and committee co-chair for the national Academy of Religion. Many other examples abound, of faculty expertise given on regional television news, or city initiatives to train police, or op-eds in the newspapers.

### **Mission-Centered Learning Goals integrate Critical Concerns of the Sisters of Mercy**

The Critical Concerns of the Sisters of Mercy: Immigration, the Earth, Racism, Nonviolence, and Women have taken on increasingly urgent relevance as our community has worked to respond to a range of issues of heightened concern to our students. Our faculty scholarship resonates in teaching students: from poverty in Erie to immigration and human rights to the climate crisis to racial justice, these issues reverberate as concentric circles from the local/regional to national, to those global in scope. Notable examples of each Concern will illustrate the scope.

**Immigration:** National Week of Solidarity with Immigrants and Refugees (Oct. 21-25, 2019). In recognition of the Sisters' of Mercy critical concern for immigrants, the Departments of World Languages, Applied Sociology and Social Work, and Catholic Studies, in conjunction with the Vice President for Mission created events for speakers, films, webinars, and a culminating event in which exhibitors from the Erie community joined in celebrating immigrant cultures and refugees, educating attendees in the ways they can help their communities.

**Earth:** Sister Maura Smith, RSM 2017 Earth Day Lecture. The annual event is perhaps one of the most public indicators of the institution's unwavering, multi-disciplinary commitment to the Core Value of Global Responsibility, and environmental justice, typified by 2017 speaker Tara Houska, [Couchiching First Nation](#) tribal rights attorney who had been deeply involved in the Dakota Access Pipeline struggle.

**Racism:** Establishment of Mercyhurst Office of Equity, Inclusion, and Justice (2020). In response to the national racial reckoning that followed the murder of George Floyd, Mercyhurst University established an Office for Equity, Inclusion and Justice to elevate our commitment to confronting racism and advancing racial justice, coordinated by staff to coordinate work, including a concerted effort to have faculty (through the Center for Teaching Excellence) and all employees (through Morning Buzz articles) adopt a common discourse of antiracism and white

privilege; a continuing series of brief reflections on racism in the Morning Buzz; and the planning of more intensive trainings and discussions for AY 2020-21.

**Nonviolence:** Faculty and students participated in an Erie “On the Move” initiative to mainstream Nonviolence (September 2017); and The Clothesline Project campus display focused on domestic violence (October 2020). The Mercyhurst Bystander Intervention Committee, collaborates with the Mercyhurst Empowerment and Prevention Project and the Pennsylvania “It’s On Us” Grant to support many more programs like this.

**Women:** Women’s Suffrage Centennial/Voting Rights Events (AY 2019-2020). Mercyhurst. Faculty collaborated with a variety of regional organizations led by the Erie County League of Women Voters, the Departments of History, Political Science, and Anthropology and conducted a series of campus events to raise contemporary, and urgent concerns over voting rights in America.

**All Critical Concerns:** “Hurstories”—video short documentaries produced in association with the “Make Mercy Real” initiative of the Sisters of Mercy (April 2019), Students in Dr. Averill Earls’s Digital History: Documentaries class produce short video documentary histories that illustrated both Mercyhurst history and how people in the Erie community “make mercy real” by living out the Sisters of Mercy’s Critical Concerns: Immigration, the Earth, Racism, Nonviolence, and Women. They were compelling testimonials of how the Mercyhurst Mission is alive, both in the Erie community and across our curriculum. See:

<https://hurststories.wordpress.com/2019/04/01/make-mercy-real/>

### **Summary of compliance:**

The mission and goals are clearly and comprehensively supported by scholarly work and creative activity. Faculty scholarly activity is fairly robust and at an appropriate level for this middle-sized university. It should be acknowledged that until recently, greater levels of institutional support for scholarly activity by faculty was available than those that currently exist at Mercyhurst. For nearly a decade (since roughly 2006), support was growing, coming through annual research contracts (giving faculty a reduced load of one or two courses for a year), sabbaticals, and research fellowships. This granted a permanently reduced load, by two courses, to faculty with distinguished, prolific records of scholarly work. Beginning with AY 2015-16, as a new administration confronted severe fiscal challenges, that generous support was curtailed as faculty were asked to adopt heavier teaching loads. More recently, in the past two to three years, some support has returned in the form of selective sabbaticals.

Student involvement in scholarly inquiry through integration liberal arts and Mercy-Centered experiential and classroom learning goes beyond REACH curriculum, freshmen service, Beyond the Gates service-learning and capstone Ethics. Student research funds are limited, however for

off-campus conference attendance, even when a presenter. Students often contribute their own funds for their conference travel, for example.

As financial constraints affect the level of scholarship on campus, or time for grant-seeking by faculty, it is also reflected in the levels of financial support for faculty development through faculty development funds for travel to conferences. Even on-campus faculty training and support are modest. The Center for Teaching Excellence is staffed by one full-time teaching faculty member, and the two Faculty Development Days are faculty-led. Neither training nor professional development efforts bring outside, paid experts to lead in expertise.

**Standard: I-1f: clearly defined mission and goals that are publicized and widely known by the institution's internal stakeholders**

**Potential Evidence:**

*Student Handbook p. 6 (located on Student Hub portal)*

*Employee Handbook p. 2 (located on Employee Hub portal)*

*Faculty Handbook 2019-20 p. 2 (located on Employee Hub portal)*

*Undergraduate Admission Requirements (university web pages)*

*Student Conduct (web pages for Office of Residence Life and Student Conduct)*

*University webpages (document to be inserted into the repository)*

*iMU course (prior to COVID) the Mercyhurst mission and core values*

*New Employee Booklet for Staff and Administration*

*social media usages of mission and word mercy (Leena Clint in PR has a record 2009-present)—*

*Mercy Emissary Program*

*Student Ambassador Program*

*Interpretive Plan for Mercyhurst's interpretive historical wayside marker program*

*Evidence Name: Mercyhurst University Archives, Website, and Committee*

**Summary of Evidence:**

The university's mission is publicized in a number of ways, including: internal documents and handbooks; orientation and onboarding activities; programs and activities for ongoing education; websites, email and social media; printed communications; and archives/markers on campus.

Within important university documents, the mission and core values of the institution are prominently displayed. The faculty and employee handbooks list the mission and vision statements and core values on page 2 and the student handbook lists these on page 6 (after a longer table of contents). The fact that the mission statement and core values are at the beginning of these important university documents substantiates the relevance of them. Additionally, the Faculty Handbook demonstrates the ways in which the history, mission, vision, and core values of the university are central in the policies and practices of academic affairs at the university.

As employees and students are onboarded to the university, there are clear mechanisms in place to orient them to the mission and core values. A New Faculty Orientation is offered each August, and this day-long event includes a 45-minute mission presentation. As the Power Point presentation demonstrates, this session covers the history of the Sisters of Mercy and of Mercyhurst University, as well as an introduction to Catholic Higher Education and Mercyhurst University's mission, vision and core values. A similar new employee orientation (for non-

faculty) is offered periodically as needed when at least a dozen new employees have arrived at the university. This program was initiated in 2018 and expanded to a full-day program in 2019. It is typically offered twice each year. Staff Senate has also created a New Employee Booklet for Staff and Administration entitled “Welcome to the Mercyhurst Family.” The nine-page document is given to each new staff and administration member electronically by the Staff Senate President after the New Employee Orientation or when they are announced to the Mercyhurst community in the Morning Buzz daily e-newsletter. The introductory welcome letter on page 1 demonstrates the importance of the mission and vision in its very first sentence: “Dear New Mercyhurst University Staff Member, On behalf of the Mercyhurst University Staff Senate, welcome! As a staff member you are one of the greatest resources the MU community has and it is our goal to support you as you work to fulfill the mission and vision of the institution.” This placement contributes to how widely known the mission is among all new staff and administration employees.

For student onboarding for mission, each year during Welcome Week, which serves to orient new students to campus, a special mission presentation is offered that gives a brief introduction to the history and mission of Mercyhurst University, as well as an introduction to campus ministry and community engagement. It is noteworthy that due to a Covid-19 restricted Welcome Week in August 2020, the mission presentation was not offered this year. In addition, the traditional freshman service project, which annually send 700-plus students to do service in the local community during one of their first days on campus, was adapted this year to give students opportunities for virtual service through creative opportunities such as creating motivational videos for children at our local partner community school, Diehl Elementary.

One of the most effective results of these Welcome Week sessions is that at the conclusion of the session students fill out a voluntary student interest form (a physical form through 2018, an online form beginning in 2019). This form gives mission area directors information on students’ religious preferences and gauges students’ desire to participate in service and ministry offerings on campus. The data from these forms is used regularly for gauging student interest in programs and events and for inviting students to specific programs and events. As students enter their first year, all incoming students are encouraged to learn about the mission and core values of Mercyhurst through a specified unit in their iMU course. It is a curricular requirement and serves as an introduction to Mercyhurst and transition into college courses.

Once students and employees are oriented, they have ample means for continuing to learn about the university’s mission. Established in 2012 through the Staff Senate, Employee Professional Development Days (EPD Days) have been an important ongoing source for communicating and deepening in mission with employees. EPD Day is an annual in-house conference designed to offer employees a chance to connect across departments while engaging a variety of pertinent topics. Each year this day incorporates at least a few sessions that explicitly center on mission. This event is coordinated by Staff Senate and by the mission office on a rotating basis as of 2020. The 2020 EPD Day featured an opening mission keynote on “Catherine McAuley and the Ministry of Higher Education” and a closing large group discussion about the university’s mission, along with several other sessions related to mission and

diversity, such as a session on The Sisters of Mercy and health care. More than 120 employees attended this training day in 2020.

The Mercy Emissary program was founded in 2015. As the brochure for this program states, it was founded “in order to empower employees as guardians of Mercy and Catholic higher education; at times in a prophetic role; develop and embody a whole new way of Mercy leadership in higher education; and, together, to the extent that each employee can commit to Mercyhurst and its future, become an honest, hope-filled mission community.” Mercy Emissaries is modelled after the Mercy Associate program and was approved by the regional office of the Sisters of Mercy in 2015 as an adaptation offered specifically for the ministry of higher education at Mercyhurst University. The word “Emissary” was chosen because the word suggests someone who carries forward a special mission. The year-long voluntary program features monthly gatherings, offered twice for convenience. Monthly topics include: a program overview; Catherine McAuley, Frances Warde, and the spread of Mercy to the U.S. and Erie; Mother Borgia Egan and MU foundations and history; Catholic Intellectual Tradition; Catholic Social Teaching; current works and services of the Sisters and the Critical Concerns; and a capstone retreat on Catholic and Mercy spirituality. Following the initial year-long training, Emissaries gather for periodic additional trainings, retreats, social events, and service and social justice advocacy opportunities.

While there were no specific initial targets for numbers of participants, the ongoing interest in the program has been exceptional. The program for employees began during the 2015-2016 academic year, during which 31 participants and 8 team members participated. The next four cohort included 25, 22, 36 and 34 employees respectively. Altogether, 156 employees voluntarily completed the program during the first 5 cohorts. After a group of students approached the mission officer about expanding this program to students, a new student version was initiated in 2019-2020. 25 students completed this first student emissary cohort, with another 7 currently enrolled in the 2020-2021 cohort. At the conclusion of the Mercy Emissary program, employees and students complete thorough written evaluations and a survey of interests for ongoing mission activities. Evaluations have helped with tweaking program logistics and reshaping some of the sessions. Evaluations have also provided a substantial list of creative ideas for continuing education, community and spiritual opportunities.

Student Ambassadors are chosen each year following a rigorous training and selection process which includes multiple presentations on the history and mission of the university. Students recognize this position as an honor, and student ambassadors are compensated for their hospitable services, such as offering tours and assisting with campus events. As the Ambassador program statement notes, students in this program recognize that they have an essential duty to carry on the mission of the founders, the Sisters of Mercy. This program has bolstered efforts to study and explain the university’s mission, adding a historian position in 2018. As a more subtle evidence of the ways in which mission specifically takes root through this program, in 2017 student ambassadors decided, of their own accord, to create a regular schedule for pairs



of students to make weekend visit to the Mercy Motherhouse and the local House of Prayer (another Mercy Ministry) to spend time with and learn from Sisters in the area.

It is noteworthy that the Conference for Mercy Higher Education Self-Study Peer Review Report (November 2020) commends both the Mercy Emissary program and the Student Ambassador program as exceptional examples of programs that support the mission and identity of the institution. Also, the winter 2019 American Catholic Colleges and Universities (ACCU) Newsletter featured an article on Sr. Lisa Mary McCartney, former vice president for mission and current mission associate, on the success of the Mercy Emissary program. The article was shared with all employees and trustees and linked to the university website.

The university community utilizes a variety of ongoing communication methods for its internal stakeholders, each contributing to awareness of the mission and core values. Published each Monday through Friday morning when in session, and typically weekly during semester breaks, the Morning Buzz is a regular source of mission-related updates. 2020-2021 examples include updates on “adopting a common language about antiracism,” daily quotes from the Mercy tradition during Mercy Week in September, a regular feature of historical facts about the university, and a series of Advent spiritual reflections. The HUB page, managed by Institutional Technology, offers separate sections for students and employees as a common location for information about campus services, events, policies, etc. This site includes a mission page that lists the mission, vision and core values, along with several other initiatives connected to mission.

Moreover, the office of marketing and public relations has a sustained commitment to researching and telling the Mercy, Catholic story of the university within the community, throughout the region, and beyond. The public website, managed by the office of Marketing and Public Relations, serves as a dynamic point of contact with the external community. The site features a tab for mission and includes statements about the history of the university, the Catholic nature of the university, and the mission, vision and core values. The Weekender is a fully online publication managed by the Campus Involvement Center that is available through the Student Hub site. It offers weekly updates on programs and events. The student-led paper the Merciad features regular pieces on the Mercy mission and related events. A few examples from fall 2020 these include: the “Mercy March for Black Lives,” a new commissioned painting featuring a quote from former university president Sr. Carolyn Herrmann, the Campus Ministry Carpe Diem retreat, and the Student Mercy Emissary program. The office for PR and Communications also uses various social media outlets to promote mission-centered events and gather student participation, such as through promoting the Mass of the Holy Spirit and facilitating a special day of Thanksgiving videos from the campus community (11-19-20). Periodic initiatives use printed materials to highlight the mission, e.g. when large banners of the Critical Concerns of the Sisters of Mercy were placed on both campuses during the 2018-2019 academic year. The Campus Ministry electronic bulletin is emailed to all students each Tuesday listing regular events in campus ministry, for example, liturgies and fellowship groups, and also highlighting special mission-centered events like Mercy Week, Mercy Emissaries and various service and social justice-related activities. Lastly, Mercyhurst Magazine is a periodic publication

for all campus stakeholders: students, employees and alumni. This magazine features regular updates connected to mission. In fall 2020 a special edition was created amidst Covid-19 pandemic: an issue entitled “Resilience and Resolve” highlighting historic moments when the Sisters and other leaders faced adversity with courage and compassion throughout the university’s history.

Additionally, the university has instituted mechanisms for better preserving and communicating its rich history. In August 2015, Mercyhurst hired its first professionally trained archivist. Since that time, the Mercyhurst Archivist has established a pronounced, greatly elevated visibility for our institutional history and Mission. Beyond the immense task of organizing, cataloging, processing, and creating a preservation plan for the nearly 100-year voluminous collection of archival materials dating to the founding of the college, our archivist has established a vibrant, engaging University Archives Web site, a broadly inclusive Archives Committee, a daily presence in the Morning Buzz with a “Today in Mercyhurst History” feature, and working relationships with our Marketing/Public Relations office, the Student Ambassadors and their Historian, as well as a variety of academic departments including History/Public History, Hospitality Management, and Intelligence Studies. The public reach and impact of our archives has been extended across and beyond our community. Two examples: in 2018-2020, a document unearthed by our Archivist—a stirring prayerful public address by Sister Carolyn Herrmann delivered just days after “Bloody Sunday” in Selma, Alabama in the struggle for voting rights (just prior to leading several hundred Mercyhurst students and faculty in a sympathy march through our gates)—was integrated by one faculty member into classroom lectures, a *Mercyhurst Magazine* article, and community lectures on local African American history. Second, a tour of the Erie Cemetery in October 2020 highlighted the historic connections between key Mercyhurst figures and events and the regional struggle for racial justice.

Another creative means for communicating the mission internally is through a new interpretive wayside marker program. In 2018-19, the position of Student Ambassador Historian was established and charged with helping to instill in each new cohort of Ambassadors a deep understanding and appreciation of the history, Core Values, and Mission of Mercyhurst University and legacies of the Sisters of Mercy. The first Ambassador Historian, a Public History major, developed an Interpretive Plan for Mercyhurst University’s interpretive historical wayside marker program. The Marker Program envisions a series of 14 wayside markers to be located across campus, each one spotlighting different aspects of our history and mission. The Interpretive Plan integrates the subject matter of the markers with other supporting materials to be used by Ambassadors in giving tours to campus visitors. Once completed in 2023, the markers—the first of which was installed in 2019 at campus pub, The Roost—will honor and celebrate the mission and history of Mercyhurst University as it approaches its centennial in 2026.

### **Summary of Compliance:**

The 2020 Employee Mission Survey offers evidence that these collective efforts for onboarding, and ongoing training and for communication and preserving the university's mission and history are helping most employees to have a clear knowledge of the tradition; however, there remains some room for growth. It is noteworthy that employee respondents represent employees who have worked at the university from 0 to 40 years, and their responses to some questions represent different historical times in the university's development. 74% of employees say they were introduced to the university's mission and core values amidst their onboarding process. 68% of employees find that the Mercy and Catholic mission is strongly present in external marketing and 73% find that the mission is evident at college-sponsored events. A much higher percentage of employees, 91% find that the Mercy and Catholic identity is strongly present in internal communications, such as the Morning Buzz, the *Merciad* and Mercyhurst Magazine. An impressive 98% of employees are familiar with the core values, 91% are familiar with the Critical Concerns of the Sisters of Mercy, and 86% of employees report that they are familiar with basic principles of Catholic social teaching. 96% of employees also find that the Mercy heritage and Catholic identity of the university is evident through its physical environment.

New Faculty Orientation's new format since 2018 has been a helpful source for motivating faculty to join the Mercy Emissary program, as demonstrated through an increased number of new faculty who choose to join the Mercy Emissary program. Comparatively only 2 new faculty joined the Emissary program in 2017, whereas 6 new faculty joined in 2018 and 7 new faculty joined in 2019 enrolled in the program. Evaluations from the two AY 2019-2020 New Employee Orientations demonstrate that employees are overwhelmingly satisfied with this program. When asked if the day gave them important information about working at Mercyhurst university, 12 strongly agreed and 12 agreed with this statement. When asked for specific feedback about the day, several employees specifically cited the presentation on mission as insightful and important.

The Winter 2019 American Catholic Colleges and University's feature on the Mercy Emissary program and the CMHE report commendation offer clear affirmations for the ways in which the this program represents a creative best practice for how a religiously-affiliated university can carry forth its founding religious charism amidst a diminishing presence of the religious order itself in the institution. A written program evaluation is conducted at the conclusion of each cohort, and feedback remains overwhelmingly positive for the value of the program. The Mercy Emissary program has been an extraordinarily effective program for helping employees and students to recognize the concrete ways in which they carry forward the legacy of the Sisters of Mercy. The program has become so popular that the office of alumni requested that we form an alumni version of the program (began in September 2020) and the board of trustees has requested that we form a trustee version of the program (scheduled to roll out in February 2021). An ongoing challenge will be how to continue formation and community building with employees, students (and now alumni and trustees) following their initial year of training.

Although difficult to quantify, the response from the Mercyhurst community to the enlivened presence of our archives has been exceedingly positive. The evidence can be seen in the growing number of students, faculty, and staff who have worked with our archivist, who have had the doors of the archives opened to them in their searches for a particular piece of Mercyhurst history, and in the number of visits to the Archives web site: well over 1,000, from January through October 2020, to cite the most current figures. Reference requests to our archivists have also soared, from roughly 25/year to between 100-150—another statistical indicator of the rising value of Mercyhurst history and Mission.

It is noteworthy that two Middle States cycles ago the university was charged with a creating new “Mercy Week” initiatives to highlight the Mercy and Catholic identity of the institution. This was in response to a clear deficit in programs and structures for highlighting and celebrating the university’s mission and identity. Such programs began in 2008 and continued through 2019 with various formats ranging from a December or March Mercy Week to a spring Mercy Month. In 2019 the all-university mission committee discerned that there are now so many mechanisms in place for regularly demonstrating the mission and core values that a separate week of programming has become unnecessary. Mercy Week is now a simple commemoration that aligns with September 24<sup>th</sup> (Mercy Day) and the annual Mass of the Holy Spirit in the fall.

**Standard: I-1g: clearly defined mission and goals that are periodically evaluated**

**Potential evidence:**

*Employee Mission Survey 2020*  
*BOT Mission Subcommittee Charter on Mission*  
*Board of Trustees Meeting Minutes Winter 2018-Winter 2020*  
*Revised University Bylaws September 2020*  
*Renewal through the Mercy Mission Update 2.1.2020*  
*Academic Departmental Self-Studies*  
*Board of Trustees Minutes Winter 2018*  
*Board of Trustees Minutes Winter 2019*  
*Board of Trustees Minutes Winter 2020*  
*Strategic Plan Update 2.14.20*  
*Strategic Plan HUB Site*  
*2023 SP Timeline*  
*AGENDA Cabinet Strategic Retreat July 2019*  
*BOT Mission Subcommittee Charter on Mission*  
*BOT Mission January 2019 Summary*  
*MISSION 10.6.2020- Executive Summary*

**Summary of evidence:**

*Editor's note: While Standard 1-4 is very similar to this substandard, it asks about how mission and goals are "assessed." This section is distinguished by this substandard's language of "evaluated." We interpret this distinction to mean that this particular substandard should examine if the mission and goals are actually effective.*

The university has recent, strong evidence that the mission is concretely impacting the daily work and perceptions of employees. An electronic employee mission survey was conducted between November 2019 and January 2020. This survey had solid participation, with 170 employees completing it, split equally among faculty, administrator and staff participation. This survey is particularly helpful because several questions on it were repeated from a similar survey that was conducted in 2011 through the Civic Institute. This 2020 survey, which largely explores employees' perceptions and attitudes, is divided into four areas: Catholic Identity and Mercy Heritage, Mission in Decision-Making, Communication of Mission and Experience of the Catholic Identity/Mercy Mission. A few findings from this survey are especially noteworthy.

First, the most significant and crucial change between these surveys is that in 2011 when asked if the Mercy heritage can be sustained without the presence of the Sisters on campus, 38% of employees strongly agreed or agreed that this could happen, with 62% strongly disagreeing or disagreeing that this could happen. When asked the same question in 2020, 80% of employees agreed or strongly agreed that the Mercy heritage can be sustained without Sisters on campus,

with only 20% disagreeing or strongly disagreeing that the heritage can be sustained without the Sisters. The university celebrates this vital movement in perception and in the locus of ownership of Catholic and Mercy identity.

Other key indicators from this survey stand out. Employees feel that they are vital to carrying forward the mission (98% strongly agree or agree with this statement), and employees recognize that the mission connects to their daily work on campus (95% strongly agree or agree with this statement). 93% of employees agree or strongly agree that they have adequate opportunities for ongoing education in the Mercy mission of the university. 85% of employees also believe that the mission is important to students. 96% of employees report that Mercyhurst University is committed to promoting the ethical, moral and intellectual growth of its students. 90% of employees find that service and presence to the poor and marginalized is highly valued and practiced at the University. These findings point back to the mission and core values as making a substantive impact on the experiences of employees.

There is evidence that employees also believe that mission is an important component of institutional planning. 78% of employees agree that mission is an important component of strategic planning. 76% of employees perceive that the Board of Trustees takes the mission seriously in its planning efforts. 73% believe that the university's administration takes mission seriously in its ongoing planning. As the February 2020 *Renewal Through Mercy* update demonstrates, the university's strategic planning has been very effective, with nearly every strategic area and action listed in the planning document bringing forth concrete initiatives, many of these with connections to the mission.

At the same time, when asked if they are treated in a way that reflects the core values of the university, 71% of employees strongly agree or agree that they are treated in such a way, while 29% feel that they are not treated in a manner consistent with the mission. There are mixed opinions about the administration and particularly the allocation of financial resources and personnel. 73% of employees perceive that the administration takes the mission seriously in its ongoing planning and decision-making, 69% of employees believe the mission is adequately reflected in the allocation of personnel at the university, and 50% of employees perceive that the allocation of financial resources reflects that mission. Altogether, this mission survey and other sources of ongoing assessment provide very helpful data for planning and have helped the university to clarify key areas for further discussion and action.

Another significant piece of evidence for evaluating the mission of the university can be found in our ongoing assessment of the REACH curriculum. In 2016, Mercyhurst University adopted a new general education curriculum: REACH. The REACH curriculum is designed to expose students to a variety of courses and experiences central to the liberal arts. The REACH courses also provide students with opportunities to meet the university-wide learning outcomes, including: challenging mindsets and assumptions; developing critical thinking and problem-

solving skills; encouraging curiosity and creative inquiry; cultivating an appreciation of arts and culture; and igniting community awareness and engagement.

One significant component of the REACH curriculum is the outREACH experience. outREACH spans the freshman, liberal arts, and senior components of the curriculum. In the freshman iMU courses, students begin building a foundational understanding of the Mercy Mission, Core Value, and the critical concerns of the Sisters of Mercy. Then, during either the sophomore or junior years, students complete the Beyond the Gates (BTG) experience. BTG is an experiential learning opportunity for all students, centered on the idea that learning through real-world, personal engagement enables students to apply academic knowledge and skills in developing critical insight about themselves and others, our mission, and civic responsibility. Finally, all seniors enroll in a Capstone Ethics course that serves as a culminating experience of the liberal arts education. Students reconsider the Mercy Mission and Core Values in light of their academic experiences, and as applied to specific questions of social justice. Through this capstone course, students learn to take the mission and core values beyond the gates of Mercyhurst and apply them to their personal, social, and professional lives.

While each piece of outREACH certainly contributes to the development of the Mercy-filled academic student, the Beyond the Gates (BTG) program is the true hallmark of the program. An essential component of the undergraduate core, BTG builds on students' foundational understanding of the Mercy Mission, presenting service as an opportunity to challenge preconceived notions, broaden worldviews, and leave students changed for the better. At sites throughout the regional community and around the world, our students engage in cross-cultural learning through person-to-person interactions, meeting the needs of the community and sharing in the critical work of civic responsibility. BTG experiences are designed to transcend simple volunteerism; BTG is about serious and deep engagement with people from diverse backgrounds, those with differing life experiences. An education informed by these principles is excellent preparation for future careers in a global workforce. When students build a sense of civic engagement and participate in real-world collaborations, they learn how to think critically and apply academic knowledge outside the classroom.

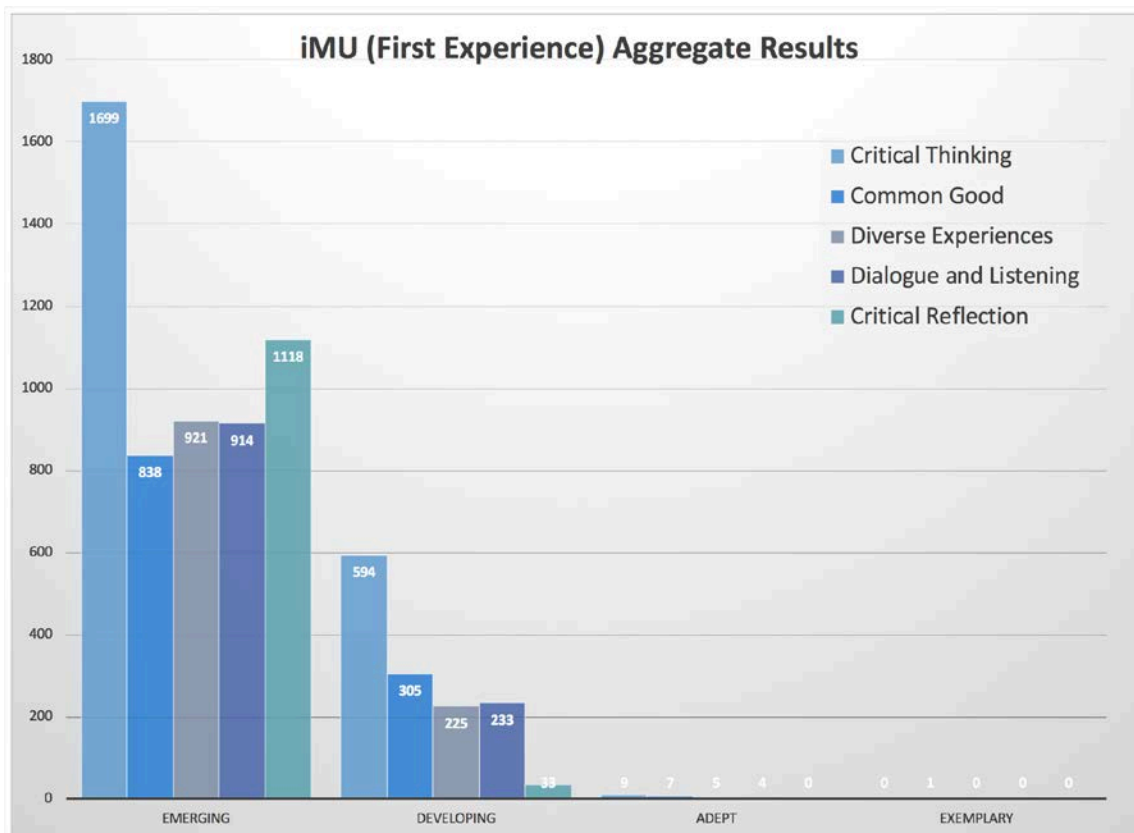
In each piece of the outREACH experience, students complete writing projects to facilitate their reflections on their community engagement and draw out the significance of how their work beyond the limits of campus connects with their academic study, personal development and Mercy Mission. Using an e-portfolio system, student responses are cataloged and stored across their four years at Mercyhurst. A joint effort between the Dean of Global Programs and Experiential Learning and the Office for Institutional Effectiveness led to the creation of a set of clearly articulated learning outcomes for the outREACH experience, as well as a maturation-based rubric used for assessing student written responses. Applying that rubric over time will create a longitudinal data set that, we believe, will be one of the first examples of a comprehensive study of mission integration across the curriculum.

During the 2019-2020 academic year, the first group of students to have started the REACH curriculum as freshman will be seniors and enrolled in the Capstone Ethics course. This data will be processed during the subsequent summer, and the full longitudinal data set will be available in late fall of 2021.

The Learning Outcomes for outREACH are:

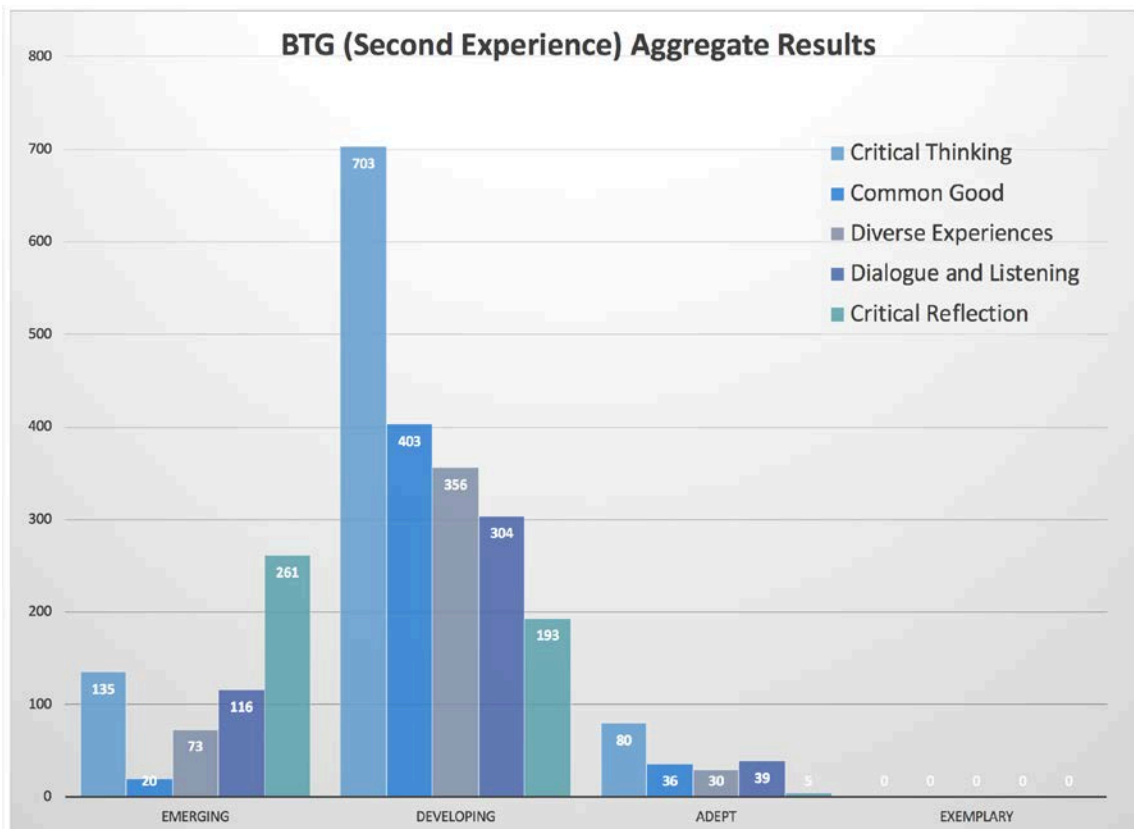
- Apply academic knowledge and critical thinking skills in an unfamiliar context.
- Demonstrate increased confidence in their ability to contribute to the common good.
- Develop an empathetic understanding for people and other life situations.
- Practice listening and dialog as essential to meaningful human interaction.
- Reflect critically on their outREACH experiences and the interconnections between learning in and outside of the classroom.

Preliminary data from the first two cohorts of iMU and BTG participants show clear increases in student understanding and application of Mission. The charts below show the rubric score results for the aggregated iMU data (Figure 1) and the aggregated BTG data (Figure 2)



*Figure 1 iMU Aggregate Rubric Data on all outREACH Learning Outcomes*





*Figure 2 BTG Aggregate Rubric Data on all outREACH Learning Outcomes*

As demonstrated in these figures, there are clear positive shifts in student learning and engagement with the mission over the first two outREACH experiences (iMU and BTG). As expected, all of the shifts are not equal across learning outcomes – this highlights the fact that some of these learning outcomes are simply more difficult than others, and in fact are a challenge even for mature adults. Still, the data demonstrates that our students are growing in areas that are particularly resonant with the Mercy Mission and that there is still room for growth as they continue in their Mercyhurst education.

#### **Summary of compliance:**

As noted elsewhere in this report, it has been more than five years (2012) since the Board of Trustees last formally evaluated the mission, vision and core values, even though the Mission Subcommittee's bylaws state that it will review these every three to five years. New structures will need to be put in place at the Board and cabinet levels to ensure that these are reviewed with the appropriate frequency. As the executive summary of the October 6, 2020 Board of Trustees Mission Subcommittee meetings reflects, this committee discussed that it is aware of

this deficit and is suggesting mechanisms for predictably reviewing these foundational documents. A more rigorous system of accountability should be put into place to ensure that the mission is reviewed every 3-5 years and stated. This could be directed by the Vice President for Mission Integration, who then shares important insights from the review with the campus community.

The Employee Mission Survey (2020) demonstrates that employees understand and value their connection to the Mercy mission. At the same time, a number of these employees are not always sure if they are treated in a way that reflects that mission, and nearly half of all employees are unconvinced that personnel allocation reflects the mission. The administration believes that this ambivalence is in part a response to no raises being given most years over the past decade. When the employee mission survey is disaggregated to look at responses from faculty specifically, it becomes clear that a substantial number of faculty are frustrated by the lack of raises and are losing confidence in the centrality of mission amidst resource and personnel allocation. Of 36 faculty respondents, 78% disagree or strongly disagree that mission influences financial decisions at the university and 61% disagree or strongly disagree that mission influences allocation of personnel at the university. These findings point to the need for ongoing opportunities for administration to listen to and dialogue with employees, and to take steps to show with more clarity how ongoing financial decisions are rooted in the mission and core values. This also points for the need for the administration to be transparent with employees regarding the continual financial and demographic challenges faced by the university and all like it within the region, coupled with a need to be cautious with raising student costs.

The innovative approach to assessing and evaluating student growth in mission-centered learning outcomes shows tremendous promise for continued evaluation of the mission from the perspective of students' academic growth. While it is too early to make strong claims about the university success at this early stage in a longitudinal process of assessment, there are clearly early indicators that students are growing to understand key outcomes that connect to the mission and core values. There will be room in the future to more fully evaluate this data both for pedagogical improvements and evaluating the efficacy of the university's mission.

There is ample evidence that the university's detailed and robust strategic planning process has served the institution well in creating many mission-grounded, achievable, and assessable institutional goals. Meanwhile the role of mission in institutional planning in other areas, such in resource and employee allocation and compensation, remains less clear.

University strategic planning process (using three-year cycles) have been effective for regularly refining the strategic initiatives of the university. The three-year cycle for new plans ensures that there is a regular process for updating and revisiting strategic goals. As the *Renewal Through Mercy* strategic plan update presented to the Board of Trustees in February 2020 demonstrates, the administration periodically reviews the strategic plan to evaluate whether or

not the plan is accomplishing its goals and remains relevant. While there is a clear current *practice* of triennial strategic plan updates, there is no evidence that the university has in writing any clear expectations for the frequency of evaluating those strategic plans. The university might wish to revisit this in its Board of Trustees bylaws and assign new charges for the Executive Committee.

**Standard: I-2: institutional goals that are realistic, appropriate to higher education, and consistent with mission**

**Potential evidence:**

*2018-2020 Strategic Plan*

*Renewal through the Mercy Mission Update 2.1.2020*

*Mission Self-Study Report (March 2020)*

*Mercyhurst Team Report\_Draft for Final Review\_Suggested Revisions*

*CMHE notice of board report approval*

**Summary of evidence:**

There is clear evidence that many of the university's strategic goals are realistic, appropriate and well-grounded in the mission and core values of the institution.

The goals of the current strategic plan, *Renewal Through Mercy*, have proven to be realistic and achievable. As the Strategic Plan update from February 2020 relates, a few goals (such as developing a Master Plan for the North East Campus) became irrelevant; however, there is clear evidence of annual progress for many of the actions detailed in the plan. For example, in response to the goal to "reinforce our commitment to the liberal arts through continued refinement of the REACH Curriculum," in the first year of the strategic plan we created the new 1-credit Beyond the Gates (BTG) service-learning requirement part of REACH brings together academics (including assessment & accreditation), students, and the Mercy Mission. 550 sophomores completed BTG among over 30 placement locations in this inaugural year. Through them Mercyhurst has given a gift to the Erie community of a collective 6600 hours of service. In the second year of the plan, we continued to integrate outREACH across the liberal arts curriculum through enhanced engagement in the Capstone Ethics course. By the third year of the strategic plan, iMU, BTG, and Capstone Ethics courses were now fully integrated and participating the four-year longitudinal study of mission impact on Mercyhurst students.

Another example from the 2017-2020 strategic plan was to "effectively use assessment data to strengthen our focus on student resilience and development of the whole person in the classroom." In year one of the plan, we developed assessment and rubrics for iMU and BTG, and in year two of the plan we revised the iMU curriculum to include increased focus on student resilience and success.

In the broadest sense, Catholic Universities find clear guidance and regulation through *Ex Code Ecclesiae* (1990), the Vatican document on Higher Education and through the Application of *Ex Corde Ecclesiae* for the United States document (1999). As this Application document states, "Catholic universities are participants in the life of the universal Church, the local Church, the higher education community of the United States and the civic community. As such, they 'are called to continuous renewal, both as universities and as Catholic.'" This overarching guidance

from the Catholic Church for balancing what is appropriate to university functioning with what is appropriate to Catholic identity and mission is central and at the core of the Conference for Mercy Higher Education's (CMHE) lens for framing its self-study and peer review process. This Mission Self-study and Peer Review process is a condition for on-going religious sponsorship of the University by the Sisters of Mercy of the Americas. The university's first decennial CMHE Mission Self-Study and Peer Review process took place in 2020. The peer review team was scheduled to visit campus in April 2020, but due to Covid-19 the actual scheduled self-study visit was delayed and took place virtually between October 13-19, 2020.

Within the self-study report, which was completed in March 2020, the university analyzed its own priorities and programming using the lens of the Mission Integration Core Areas as identified by the CMHE: (1) Curricular Development and Integration, (2) Hiring, Orientation, and Onboarding; (3) Ongoing Formation of Mission; (4) Space, Art, Environment, and Symbolism; (5) Inclusive Worship/Ritual and Reflection; (6) Engagement in Community and Celebrations; (7) Sponsorship, CMHE and Ecclesial Relations; and (8) Catholic Social Teaching/Critical Concerns in Action. As the report details more fully, the university identified clear ways in which each of these core areas is effectively integrated across the university while also identifying deficiencies and areas for improvement attached to each.

At the conclusion of the report, the following mission-related goals and timelines were identified in the self-study report. In terms of Curricular Development and Integration, we identified a need to analyze the liberal arts curriculum data collected regarding student's 4-year mission development through the REACH curriculum and explore the use of a cocurricular transcript with students. In terms of Hiring, Orientation and Onboarding, we identified the need to maintain and continue to improve the biannual New Employee Orientation day and accompanying resources. In terms of Ongoing Formation for Mission, the report calls for an exploration of opportunities to extend beyond Mercy identity to Catholic identity in marketing strategies and expand the Mercy Emissary program to trustees and alumni. In terms of Space, Art and Symbolism, we identified goals to create contemporary mission-centered artwork around campus and complete updates to the Mercy Heritage Room. In terms of Worship and Reflection, the report calls to explore programming and grant funding for spiritual support for students who do not claim a religious affiliation.

In terms of Engagement in Community and Celebrations, the report challenges the university to sensitively work through the North East consolidation process. In terms of Sponsorship, CMHE and Ecclesial Relations, we identified the need to enhance relationships with Sisters beyond Erie through the CMHE and national/international Mercy organizations, both through student and employee opportunities. In terms of Catholic Social Teaching in Action, a number of strategic goals were identified: revisit the university's Vision Statement; communicate the interdependence of Catholic and Mercy identity through resources such as a document combining Catholic Social Teaching, the Critical Concerns of the Sisters and the Core Values; explore the Carnegie Classification for Community Engagement; create and utilize more productive channels for the administration to share honest dialogue with faculty about the current financial realities and challenges of the university; continue to explore means of

providing students with supports to work through challenges of anxiety, depression, isolation; provide continuing supports, adequate space, and transitional resources to the single parents with children; explore possibilities for expanding service and immersion trips; and conduct a strategic self-study of its sustainability initiatives in order to ensure that this area of the university receives due attention and resources and has in place an effective leadership structure.

The team report (issued in November 2020) offered eleven commendations for areas of noteworthy achievement in mission: The Mercy Emissary Program, the Student Ambassador Program, attention to the liberal arts within the curriculum, the development of the whole person, the trustees of the university as advocates for mission, the creation of a cabinet-level position for mission, a commitment to service, a robust campus ministry, a commitment to the arts, the campus environs, and President Michael Victor as a beloved leader. The team also offered the following eight recommendations: pay attention to the needs of the adult student population; examine alternative modes for community-based learning with the aim of creating closer ties to the academic area and the faculty; clarifying for students what service in the Mercy tradition actually means; exploring communal living opportunities as students offer service; frontload ethical theory earlier in service-oriented courses and programs; consider wider, on-going methods of campus communications; emphasizing diversity to relate to the Mercy value of inclusion; adopting Mercy-full teaching schedules among scholars; and reinvigorate the sustainability program.

Finally, the visiting team offered three areas that the team identified as needing further conversation among the members of the Mercyhurst community. These are not recommendations, but rather broader questions that relate to the ways that the University manifests its commitment to the Mercy Catholic mission now and into the future. The first is a dichotomy of understanding with respect to “Mercy and Catholic.” When the campus community stresses that they “embrace *Mercy*,” but would rather not identify (or perhaps name) *Catholic*, it speaks to a poverty of understanding with respect to the rootedness of Mercy in Catholic faith and values. The second is a call for contemporary engagement with both the Catholic Intellectual Tradition and Catholic Social Teaching, which is not as explicitly present in curricular and cocurricular activities as one might expect at a Catholic university. The third is inviting the university to begin the work of owning the mission in your own right and relying less on the local Sisters for this identity.

While this report identifies clear new areas for growth, the significant overlap between the university’s self-identified goals for mission and the peer reviewers’ report offers a helpful confirmation that the university is honest and self-aware in its mission self-assessments, and has identified important areas for growth and improvement.

**Summary of compliance:**

The response of the CMHE Peer Review Visiting Team offers the university clear and objective evidence that the university's planning and processes are overwhelmingly in line with the goals for a Mercy and Catholic higher education. The team's report offered commendations, recommendations, along with a few items for ongoing conversation. The recommendations align almost completely with the recommendation from the university's own self-study report, offering clear evidence that the university has been honest and accurate in its self-assessment. On November 24, 2020, the university was notified that its self-study report was unanimously accepted and approved by the CMHE's board of directors. As the Team said in the closing section of the report, "In closing, the Visiting Team found Mercyhurst University to be a warm and welcoming community passionate for its Mercy mission. The commendations, recommendations and observations in this report reflect an institution that draws vigor and joy from its history and traditions and is well-poised for the continued growth and deepening of that mission. The Mercyhurst community recognizes the charism of Mercy as its "superpower" and for this, the Conference for Mercy Higher Education celebrates Mercyhurst and looks forward to many more years of an excellent Mercy higher education presence in Erie—and beyond." The university considers this feedback a helpful affirmation that our goals and priorities are appropriate and well-grounded in the Mercy and Catholic tradition.

We have also found that ongoing strategic planning has been concrete and focused on realizable goals and actions. Many of the university's strategic goals grow out of mission while remaining appropriate and attainable.

**Standard: I-3: goals that focus on student learning and related outcomes and on institutional improvement; are supported by administrative, educational, and student support programs and services; and are consistent with institutional mission**

**Potential evidence: Academic-Related Goals**

*Board Committee Charters FY2019-20*  
*Board of Trustees Meeting minutes Winter 2018-Winter 2020*  
*University-wide Learning Outcomes*  
*Assessment Handbook Fall 2019*  
*Assessment Plans and Curriculum Maps*  
*Annual Assessment Reports, Action Plans, Five-Year Self Studies*  
*Assessment Institute Schedules (8/2019 training)*  
*IDEA Global Learning Outcomes with Mercyhurst Learning Outcomes*  
*IDEA Diagnostic Instrument*  
*Program Learning Goals and Outcomes*  
*REACH Curriculum*  
*Celebration of Scholars (2015 Evidence)*  
*Celebration of Scholars (2018 added)*  
*Center for Teaching Excellence (CTE) Programming AY18-19*  
*Faculty Senate Minutes*

**Potential evidence: Institutional Goals**

*Mercyhurst University Strategic Plan "Renewal Through the Mercy Mission, Fiscal Years 2018-2020"*  
*"Renewal Through the Mercy Mission Fiscal Years 2018-2020, Mercyhurst University Strategic Plan Update" February 1, 2020.*  
*Conference for Mercy Higher Education (CMHE) Mission Self-Study "Mission Accountability Self-Study and Peer Review" March 1, 2020*  
*NSSE Survey*  
*USE Survey*  
*Mercyhurst University COVID-19 Policies and Planning*  
*Budget Planning Process Chart rev. 3*  
*Budget Process Review, 2018*  
*Annual Financial Audit*  
*Assessment Handbook Fall 2019 (page 20)*  
*Consolidated Financial Report, May 31, 2019*  
*Budget to Actual Reporting (redacted)*  
*Donor Report 2019 (2018-2019 Yearly Comparison)*  
*Annual Fund Comparison since FY2009*  
*Endowment Market Value Reports*  
*Diversity Task Force Meeting Minutes, 2017-2018*



*Mercy Market (formerly MU Pantry) Nov. 17, 2020 Staff Senate minutes*  
*Leadership Development Program*  
*Executive Summary—Community Engagement Self-Study Report 2018*  
*Strategic Plan 2020-2023 (under review—document will become available in January 2021)*  
*United Way Community School Director at Diehl Elementary School*

### **Summary of evidence:**

*Editor’s note: This writer interpreted student learning and related outcomes as academic goals, and interpreted institutional goals as non-academic goals, and kept these separate. The institutional goals generally correspond to Goals 2 and 3 of the Strategic Plan for student life and administrative functioning.*

Mercyhurst University’s Strategic Plan, “Renewal Through the Mercy Mission, Fiscal Years 2018-2020” sets forth four goals for the institution. The first goal, “Renew Our Commitment to a Mercyhurst Education” is specific to education and contains five strategic goals to do so. The second goal, “Renew Our Commitment to Campus Life” lays out three strategic goals for bricks-and-mortar infrastructure, services for students, and diversity and inclusion. The third goal, “Renew the University’s Resources, Processes and Infrastructure” addresses six strategies for physical resources, administrative operations, revenue, professional development and compensation, and campus safety, through six strategic goals. The fourth goal, “Renew the Mercyhurst North East Vision,” contains three goals to address academic programming, campus services, and a master plan, and operations.

All four goals focused on either academics or institutional improvement; all four goals and most strategic goals are supported by the necessary administrative, educational and student support programs and services to the extent they are adequately funded; all are consistent with the University mission; and all goals align with MSCHE Standards, our Mission Statement, Vision Statement and Core Values.

The fourth goal for North East campus was developed, but during implementation of the overall Strategic Plan, it was determined to be unfeasible. Goals for the university’s resources and infrastructure and to renew the Mercyhurst North East vision were critically evaluated before a decision was made to instead consolidate North East programs to the Erie campus.

Evaluation of the four goals and strategic goals to achieve them was completed with the “Renewal Through the Mercy Mission Fiscal Years 2018-2020, Mercyhurst University Strategic Plan Update” presented to the Board of Trustees by the Strategic Planning Committee on February 1, 2020. A “Strategic Plan 2020-2023 Draft Plan” process was initiated in Fall 2019 and delayed due to Covid-19, but will resume in the first quarter of 2021, with a draft plan in Spring/Summer 2021. *Note that a draft of this current plan will become available for public consumption in January 2021.*

## Goals that focus on student learning and related outcomes

Goals for student learning and related outcomes are evident as the first two goals of the Strategic Plan:

Goal 1: Renew our Commitment to a Mercyhurst education, and deliver a Mercyhurst education that provides students with a distinct and transformative academic experience in preparation for personal and career success while empowering them with the knowledge and attitudes to lead fulfilling, civically engaged lives.

Goal 2: Renew our Commitment to Campus Life: Consistent with the Mercy tradition of whole-person development, provide students with an environment that supports intellectual growth as well as spiritual, professional, and personal wellbeing.

The Board of Trustees Academic Affairs Subcommittee is entrusted with providing oversight to ensure that academic programming and initiatives align with institutional mission and the achievement of institutional strategic objectives. They are responsible to “review academic budget to assess for its alignment with stated institutional academic priorities; review faculty handbook for alignment with mission and achievement of strategic goals; and review and oversee institutional academic assessment efforts.”

These goals were broadly met by an overhaul of academic services and programs in three major areas: Office of Academic Services and Support, REACH Curriculum, and Beyond the Gates experiential service learning.

Two new Vice Presidents for Academic Affairs in AY 2014-2015 and AY 2017-2018 vigorously pursued innovative changes and re-structured the Office of Academic Services and Support. Curriculum changes were designed to meet the overarching goal to create a “distinct and transformative academic experience....” The student learning outcomes process at the university was significantly strengthened by appointing an Associate Provost to oversee the office for Institutional Research and Assessment, and in AY 20 hiring a new Assessment Coordinator with a PhD in assessment.

The institution emphasized its commitment to liberal arts through creating the REACH curriculum in 2016. This flexible and robust curriculum allows students to explore different academic disciplines and a wide variety of the liberal arts and sciences over four years. Students take 10 courses in 10 different disciplines, and take two courses each from these five broad areas, with the REACH acronym: Reason and Faith (Catholic studies, philosophy, religious studies); Expression and Creativity (English; art, dance, music, or theatre); Analytical Thought (biology, chemistry, geology, mathematics, physics, science); Contexts and Systems (economics, history, political science); and Humans in Connection (anthropology, psychology, sociology, world languages). Students complete an iMU introductory course, service learning or civic engagement (OutREACH component) after freshman year, and a capstone ethics course.

## **Assessment of Educational Goals**

The goals for student learning are set out in the assessment process, described in the Assessment Handbook (Fall 2019). Departments develop Assessment Plans and Curriculum Maps, using assessment data. Annual Assessment Reports, Action Plans, and Five-Year Self Studies are reported. Recent additions include the implementation of a new “Chalk and Wire” assessment platform to monitor and verify student learning outcomes.

## **Meeting Academic Goals through Innovative new programs**

The development of innovative academic programs as both an academic goal and a revenue-generating goal resulted in the development of new programs in each College within three years, strategically focused in data science, computer science and cyber science.

Ridge College developed: a new multidisciplinary Department of Computing and Information Sciences with a focus on cyber and data science Cyber Security and Risk Management online graduate degrees, and an anti-money laundering and ethics minor. Zurn College created a fully-online full-time MS in Nursing and a Masters in Athletic Training. Hafenmaier College created a Master of Science degree in Teaching Excellence and converted the graduate program in Secondary Education to online. The Education Department expanded the number of 4+1 programs to seven. A minor in English was created to integrate writing and images for digital media. Other documentary film, integrated media and strategic communications concentrations also enhanced marketability. Walker College developed a Risk Management major, and minors in Risk Management and Management. It restructured the Organizational Leadership program to a fully online master’s degree. The Finance minor was revised to allow students to sit for the Certified Financial Planner exam.

In addition to revamping the curriculum, to attract more students the University initiated two strategic goals in 2018, one for non-traditional students, and one for community and national partnerships. This strategy to make a Mercyhurst education accessible to students from all backgrounds, especially non-traditional students, focused on graduate students and veterans. Key was the creation of a new Office of Distance Learning to focus on graduate online development (AY 2018) and Improving accessibility through online and blended courses. Results were evaluated with a comprehensive financial model for the new online programs to define the university’s break-even point and revenue-generation. The three new master’s programs are online, including Cyber Security and Cyber Risk Management, Nursing, and Teaching Excellence, as well as the Organizational Leadership program. Most summer course offerings have been transitioned to online.

The goal of improving accessibility to non-traditional students, while aligning with the Mercyhurst mission, is underscored by Mercyhurst obtaining status as a “Purple Heart” university in 2018. It is one of two such institutions in Pennsylvania, along with St. Joseph University in Philadelphia. Mercyhurst is a military-friendly school, with over 50 student

veterans, a veteran's center on campus, and active ROTC. The designation gives more outreach to veterans who were wounded in combat while serving their country and are now pursuing their higher education careers.

The second strategic goal--collaboration with community partners--spurred further program development and funding. Major academic program development resulted from multiple collaborations. These partnerships are infusing the Erie community with a much-needed workforce and resources, while providing training opportunities to students. Partnering with Erie Insurance for undergraduate and graduate risk management program resulted in four new faculty, one a senior Vice President from the Fortune 500 company, ranked as one of the Top 10 auto insurance companies. Partnering with Ohio-based MCPc to develop the MCPc Cyber Operations Center included installation of a cyber lab, two computer labs and a Security Operations Center that will employ many of our students. Partnering with PLS 3<sup>rd</sup> Learning led to the development of a master's degree in Teaching Excellence. The collaboration with the Erie Innovation District, initially led by Mercyhurst, links students and faculty to economic development projects and technology start-ups in downtown Erie.

Beyond the Gates student educational/immersion placements result in formal relationships with 30 Erie community social service agencies. Another prime example of partnership to meet Mercyhurst goals and adhere to the Mercyhurst mission is in Education Department partnership with the City of Erie School District. Mercyhurst is the lead partner in the United Way "Community School" initiative at low-income elementary schools in the city of Erie and hosts a full-time director at Diehl Elementary School to help meet non-academic needs for students and their families. This program increases experiential and service learning by multiple Mercyhurst academic departments. Notably, the Covid-19 revamped 2020 freshman service project invited a number of Mercyhurst student groups to create motivational and affirming videos for these local school children at the beginning of their academic year. Other Mercyhurst partnerships include the OCICU online education consortium, American Association of Physics Teachers, and HKBS Wealth Advisors of Erie.

### **How goals that focus on student learning and related outcomes are supported by administrative, educational and student support programs and services**

The National Survey of Student Engagement (NSEE) gains insight into students learning and personal development. It is an important assessment tool for Mercyhurst because it allows us to determine if the students' experience correlates with the function of the institution. An institution cannot accomplish its mission without taking the time to assess the effectiveness of the actual functioning. Are academic programs and co-curricular offices providing necessary services to develop student learning outcomes? Academic questions from the survey include: How much time do you spend reading? How are your interactions with faculty? Does your course have collaborative learning assignments? Co-curricular questions include: Do you have

discussions with diverse others? What is the quality of your interactions with staff? Do you find Mercyhurst to be a supportive environment?

The NSSE survey results in 2014-2015 demonstrated several poor ratings concerning our campus being a supportive environment among several administrative offices. The USE survey also validated this gap in how we are supporting our students. As a result of these NSSE and USE survey results, the university developed the “Students First” Campaign to offer reminders and resources for offices providing student services to be more customer friendly.

Widespread changes to administrative and educational support programs and services occurred in a three-year span to support student learning, as seen in the Strategic Plan update. Seven new and re-structured administrative programs and services demonstrate this support:

The new Online Distance Learning office and an academic support counselor for online and graduate students now aid non-traditional students. The restructured four Colleges and Deans work extensively with their chairs for curriculum development, advising, to ensure the efficiency of course offerings, and support the educational goals.

The university has made major technology upgrades to improve teaching in every department across campus, including Elucian Self-Service software. The Registrar’s office re-organized with a new course coding standard for increased efficiency, new reports for course enrollment and REACH curriculum, and adjustments to the waitlist process. The new faculty evaluation process was streamlined by a new “IDEA” online teaching evaluation tool in AY 19-20. Faculty Development Funds support faculty professional growth in two Colleges, Hafenmaier and Walker. The Center for Teaching Excellence holds regular workshops for faculty teaching. In FY21, the new Center director is hosting online workshops to improve teaching skills and creative use of technology that are increasingly important with COVID-19 remote teaching.

To support academic goals, the Career Services office was revamped to report to the Office of Academic Affairs; a new director was hired; internship sites and employment opportunities were developed with over a dozen major corporations. Handshake, a new online career platform was launched to aid in planning, and student job applications on-campus and after graduation. The Office of Academic Services and Support made multiple changes to support advising and student success, under two new successive Vice Presidents of Academic Affairs. Chief results were a campus-wide freshman registration process, more robust advising, and a graduation plan. The university also implemented an early alert and midterm grade notification process for students at risk of failing, chair and dean oversight of course registration waitlists including senior graduation and coordinated outreach to minimize attrition and encourage graduation on time.

Enhanced student services were made available to International students, Internal transfers from North East, and graduate students, and designated academic counselor and tutorials were made available to support all graduate and online students. When COVID-19-related travel

restrictions were imposed, these services were fully used for dozens of students who were accommodated in dorms and apartments on campus.

### **Two examples of academic goals with decreased administrative support**

Two examples stand out where educational goals are not supported as robustly as in the past. The first is faculty professional development and scholarship. This necessary support for effective teaching is currently modest and declined significantly after AY 15-16. The development of programming to promote faculty development does not have robust funding, as in the past. Beginning with AY 2015-16, as a new administration confronted severe fiscal challenges, that generous support of annual research contracts, giving faculty a reduced load, and research fellowships were suspended. Since then, some support has returned in the form of selective sabbaticals. More limited faculty development funding was initiated after AY2016 by two of the four colleges to attend conferences and contribute to their teaching and research, Hafenmaier College of Humanities, Arts, and Social Sciences, and Walker College of Business. The Center for Teaching Excellence, led by a full-time faculty member, offers programs and resources each semester. Faculty Development Days are held annually at the start of the academic year to provide opportunities for faculty-led best practices in teaching, pedagogy, student-focused scholarship, and service.

The second example where academic or institutional goals are not supported is environmental sustainability and environmental stewardship. As a stated institutional goal, environmental sustainability is also prominent as one of five Core Values (Globally Responsible) and one of five critical concerns of the Sisters of Mercy (Earth). It was prominent as one of four strategic goals for academic programs: “Renew our commitment to academic programs that promote environmental sustainability.” The educational focus is in demand in this era of climate change and international focus on renewable energy, and previously led to major campus benefits. The historic prominence of this academic program and institution-wide efforts are due to institutional commitment since 1970s of priorities of the Sisters of Mercy. Even though one of four key strategic educational goals, resources and marketing are not at all comparable to the financial and marketing resources given for other strategies, such as a newly-built academic space and curriculum for cyber and data science, and cyber security and risk management online graduate degrees.

The Strategic Plan update reports very modest results in terms of sustainability in 2017-2019. A new sustainability officer was appointed; a new environmental science undergraduate program was developed; and efforts were made to identify existing academic programming to infuse sustainability coursework. But, as of Fall 2019, the sustainability officer position remained vacant until another employee assumed this role in December 2020. The new Environmental Science Program has 12 majors enrolled. Only one required course exists that was originally developed for the Sustainability studies major or minor – ENVS 105 Introduction to Environmental Studies. The second class is optional: Responding to Climate Change. The volunteer Green Team (faculty, student, staff and administration) had worked to advance sustainability on campus for two decades, spear-heading energy-efficient efforts like green

buildings lighting and geo-thermal heating systems, and recycling. Without a leader, nor significant support in institutional commitment, curriculum development nor marketing, only limited activities can proceed and benefit students and the campus community.

### **Educational goals supported by administrative programs while implementing Covid policies**

The educational goals have not wavered since March 2020 when Covid-19 forced a rapid response by faculty to turn to on-line teaching. Within two weeks, as students went home, faculty learned to teach on Teams, then through Zoom meetings. At the outset in March 2020, “Keep Teaching” was the theme and reality.

Support to educational and institutional goals has been demonstrated through policies for the welfare of students, personnel, and visitors, to reconfigure campus spaces and follow medical guidelines.

Led by a University Mission that cultivates a campus culture with a commitment to serve others, with an abundance of caution the university has demonstrated a mission-centered overarching concern for student, faculty, and administration wellness and safety. The Mercyhurst University COVID-19 Policies and Planning document, 9/23/20 underscores the commitment to the university community by placing Mission and Core Values on page 4. A dozen policies and procedures were developed (as of September 23, 2020) and constantly communicated.

Strong academic support to students is shown with policies and procedures for reconfiguring the academic space and delivery (e.g., limiting classroom size; remote/in-class scheduling); reconfiguring campus spaces (tents to expand the dining hall); and personal spaces (accommodations for commuters). Enhanced administrative support includes increased housekeeping services and cleaning supplies, training in technology equipment, and residence hall and student life procedures. The outcomes have been to forestall remote-only learning until early November 2020. Cases and quarantines were modest until that time.

### **How goals for students are supported by administrative and student support programs and services**

Goals for students outside the classroom are amply supported by administrative and student support programs, and four examples indicate newly increased support: student health outcomes; new student services during breaks; inclusion and diversity programs; and mail and printing services.

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; athletics and counseling center for wellness and mental health; and a measles vaccine action team. A second initiative is new student services during university break periods

created for international and out-of-state students who can't return home, for dining, transportation, volunteer activities and campus recreation.

A major emphasis on a diverse and inclusive culture on campus has been cultivated through a Diversity and Inclusion Task Force. It directly addressed policy changes (gender neutral bathrooms and ADA compliance), programs (MSG speakers on topics connected to diversity), and was instrumental in moving student government to add a significant new branch to its governance structure: MAC (the Multicultural Activities Council). The new initiative for Equity, Inclusion and Justice aims to build on these successes.

There many new more developments that grow out of strategic goals. New employees' orientation now includes an introduction to working with the culturally and racially diverse student body, and students with special needs such as autism who are enrolled through the AIM program. Additional LGBTQ+ allies training expanded transgender awareness. New Policies and procedures strengthened accessibility for persons with disabilities. An ADA committee created procedures for ADA accommodation requests, and compliance review. A new testing center was built to accommodate alternative testing needs of students. Student Ambassadors saw a significant increase in persons of color; resident halls are actively recruiting resident assistants and front desk staff from students of color and international students. The "You are Welcome Here" recruitment video for international students was updated to reflect ethnicity and sexual orientation inclusivity. Campus life goals from the strategic plan were met by upgrading post office and printing services for the campus community. A contract with a new firm, ARO Managed Services, brought a new staff with a focus on improved services.

### **How goals that focus on institutional improvement are supported by administrative programs and services**

Goals for institutional improvement are evident as the second and third goals of the Strategic Plan:

Goal 2: "Renew our Commitment to Campus Life. Consistent with the Mercy tradition of whole-person development, provide students with an environment that supports intellectual growth as well as spiritual, professional and personal wellbeing." This goal lays out strategic goals for bricks-and-mortar infrastructure.

Goal 3: "Renew the University's Resources, Processes and Infrastructure. Develop practices that ensure financial viability, improve operational efficiencies, improve facilities, promote environmental sustainability, preserve the beauty of our campuses and support the members of our community." This goal addresses six strategic goals for physical resources, administrative operations, revenue, professional development and compensation, and campus safety.

### **Assessment of Institutional Goals**



The goals for campus life and administration and the institution are assessed using the Five-Year Self Study Reports. The Assessment Manual's (Fall 2019) Ten Year Self Study Schedule (Appendix, page 20) provides the list of offices related to non-academic student support including Residence Life, Campus Ministry, Community Engagement, Athletic Administration, Multi-Cultural Center, and Student Financial Services. The Five-Year Self Study Reports conducted by administrative offices includes: Finance and Administration, Advancement, Admissions, Human Resources, and Marketing.

### **Infrastructure Goals**

Mercyhurst University launched significant infrastructure improvements to enhance the quality of life for students, as two of four goals of the university focused on significant improvement to facilities, in new construction and remodeling. The construction of a sophomore residence hall with a dining hall (Ryan Hall); upgraded dining facilities; improved athletic facilities via a \$9.5 million capital campaign; new cyber security lab facilities; an Irish pub; renovated library; renovated Sisters of Mercy Motherhouse for student housing; and upgrades at student, academic and administrative buildings changed campus life significantly.

The strategies to reach the two goals seem to be limited, due to financial constraints, for construction and remodeling. There are significant infrastructure needs to be addressed, with two aging dormitories, and lack of space for additional classrooms and administrative offices. This is evidenced during COVID-19 as the two performing auditoriums were converted into classrooms, and as lounges and conference rooms in the aging Preston Hall are used for faculty offices. Preston Hall, a main faculty office space for three of four of the Colleges, has non-functioning heat in many offices, and does not have air conditioning in two of three floors. The campus deferred maintenance list is still lengthy.

### **Institutional improvement goals for Resources, Technology Infrastructure and Processes**

This goal for University Resources, Infrastructure and Processes is supported by Administrative programs and services and driven by the Cabinet and offices of Vice President for Strategic Initiatives and Chief Information Officer and Vice President for Finance and Administration. The Vice President for Advancement plays a key role, along with the President.

All institutional plans for improvements in construction, renovations, and new processes in technology systems are aligned with the educational and institutional goals. Corresponding investments are aligned to the institutional strategic goals and mission, given Board of Trustee Charters for oversight by multiple Board Committees. Financial oversight by the Vice President for Finance and Administration includes this evidence: Budget Management Policies and Procedures, the Budget Planning Process Chart; Budget Process Review (2018); Consolidated Financial Report, May 31, 2019; and Annual Financial Audit.

### **Goals for Technology Infrastructure and Processes**

Goals for renovations to campus physical infrastructure were met when the Aramark contract for maintenance department was restructured to create a deferred and preventative maintenance plan. This resulted in much needed renovations and fixes to campus physical plant (windows, HVAC, roof, as noted earlier).

Aggressive goals for new processes since 2017 resulted in major technology updates across administration offices, with at least 8 new software and technology systems for Division of Enrollment, Student Financial Services, Residence Life, Police and Safety, and Athletics; Blackboard LMS software was adopted for academics. Electronic document management was begun, impacting Financial Aid, Registrar, Health Center, Academic Support Services, HR and legal offices. Widespread campus-wide technology changes to streamline communications ranged from a new phone system and printers to SharePoint for a new employee and student website (HUB) to Microsoft One Drive for documents, Teams and shared calendars. Microsoft Azure was deployed for account management. New reporting systems improved data access and analytics, such as automated budget reports for Vice Presidents, Deans and budget directors. Finance, HR, and Enrollment also saw new reporting systems. The restructured Human Resources department enabled goals to be met for updated processes for hiring, employee orientation, employee evaluation, benefits, time entry, and new reports to the Budget Team. Compensation studies for faculty and staff were completed and implemented. These electronic systems instituted before Covid-19 proved to be game-changers in preparedness for remote work.

### **Goals for Financial Resources**

The goals for financial resources were broad, but evidence and results were unclear. The Strategic Plan goal was to generate diversified revenue streams through fundraising, grants and summer programming. To this end, a centralized Office of Grants was created, collaborating with staff from Advancement and Finance offices.

Funding from corporations and foundations increased, according to the Donor Report 2019, although the goals are not known. Instead, Mercyhurst focused on two revenue streams from major gifts, and an athletics Capital Campaign, both in 2017-2018. Major gifts for 2017-2018, totaled \$5.5 million; these included one major gift of \$1.5 million and three private six-figure gifts in 2018-2019.

Increasing funding from grants has not been met, per the Donor Report 2019. Grants and Contracts Revenue was zero for two years, nor were grants listed in the Update to the Strategic Plan. One major grant received in 2020 was an expansion of the Education Department's Carpe Diem/Mercyhurst Early Learning Innovation Academy (MELIA) grant, providing Education majors with extensive experience by managing the afterschool learning programs to impoverished areas of Erie city and county. Revenue from summer programming is unknown to this writer.

Presumably in line with the goal to increase admissions by student athletes due to improved facilities, the athletic Capital Campaign of \$10.5 million (changed to \$9.5 in 2018-19) was earmarked to provide a new surface for the football field, stadium improvements, renovations to the Mercyhurst Athletics Center and Ice Center. It resulted in the largest individual alumni donation in the university history of \$1.5 million, as the lead gift. Partnerships related to athletics were secured with several entities. (e.g., \$50,000 Under Armour contract; \$15,000 D&F Transportation; \$9,000 Field Turf; and Erie Youth Hockey in 2018-2020).

In addition to fund-raising, another financial strategy was to achieve optimal net revenue per student. Benchmarking to the University's top competition of traditional four-year students was completed by the Division of Enrollment Management in 2017-2018. The goal was achieved when the optimal net tuition revenue per student of \$14,000 was determined by 2018-2019, increased from \$9,500 from Fall 2016. The partnership with Ruffalo Noel Levitz consulting firm was also beneficial to reverse the trend of the increasing discounts for traditional freshmen. The discount was reduced, yet tuition of a smaller class generated more tuition and fee revenue than the prior year class. Financial aid awards were increased to better position Mercyhurst University to prospective students.

Another strategic financial goal is to increase enrollment through recruitment efforts. This goal is also unclear, as few specific goals are publicly available. Expansion of marketing seems limited, as only one geographic area was reported, per the Strategic Plan update, to 20 schools in Pittsburgh; and one event, a gathering of educators from the Catholic diocese in 14 counties. There is no data publicly available to evaluate marketing goals for veterans, transfer students and online graduate students, as they have higher net tuition revenue.

### **Goals that are consistent with institutional mission**

Three entities indicate that educational and institutional goals are indeed consistent with the institutional mission: the current strategic plan; the Board of Trustees structure, and seven of its committees. The very title of the current strategic plan points to consistency with the institutional mission: "Renewal Through Mercy Mission". All four goals are consistent with institutional mission:

The Board of Trustees underscores this commitment by the Board structure and mandate of the committees. The Board Committee Charters FY2019-20 for two committees specify they are directly responsible to ensure that institutional goals are consistent with mission and are aligned: Academic Affairs and Mission. Seven other board committees explicitly have an obligation to support the Mission: Advancement, Budget and Finance, Building and Grounds, compensation, Endowments and Investments, Executive (with oversight of strategic planning process) and Governance. Their activities are reported in Board minutes (winter 2018 – Winter 2020).

Carried out by all members of the President's cabinet, and in particular by two cabinet members, the Vice President of Academic Affairs and VP for Mission. The fact that there is a Mission officer at the Cabinet level with a direct reporting line to the President underscores how goals are consistent with mission. The Vice President for Strategic Initiatives and Chief Information Officer has a key role in assessing the progress of strategic goals.

In addition to the current strategic plan, the recent "Conference for Mercy Higher Education (CMHE) Mission Self-Study "Mission Accountability Self-Study and Peer Review, March 1, 2020) reveals how Mercyhurst goals are aligned with mission. Our "Covenant reflects a desire to strengthen a shared vision and mission of Mercyhurst as an institution standing firmly in the spirit and ethos of the Sisters of Mercy of the Americas and the rich heritage of the Catholic Intellectual Tradition." While all goals directly or indirectly support the academic and institution development, it is the distinct Catholic identity of the mission that resonates through the University. Five educational examples of strategic goals stand out for alignment with the Mercyhurst mission:

One is the REACH Curriculum, including its service-learning component and capstone senior course in Ethics. Beyond the Gates student educational placements result in formal relationships with 30 Erie community social service agencies. A second strategic goal is improving educational access to non-traditional students, like veterans. The "Purple Heart" university designation gives more outreach to veterans who were wounded in combat while serving their country and are now pursuing their higher education careers. Third, the goal of creating partnerships has led to the Education Department partnership with the City of Erie School District. The Carpe Diem Academy and MELIA afterschool programs serve the City of Erie's most impoverished grade schools, and a low-income area of Erie County. A fourth goal is the focus on faculty professional development, with faculty vigorously embracing the alignment of Mercy values in their scholarship. All university faculty are invited to participate in a scholarship day, presenting annual research, as "Celebration of Scholars". The 2018 program for this celebration underscores the centrality of Mission in our scholarship: *"What Catherine McAuley suggested . . . was a life pursuit, a purposeful action that drives us to betterment, betterment of community, world, and self. And in concert with such action is the recognition that change is not only possible, but expected. We move forward, driven by curiosity and the possibility for discovery."* A fifth example is the Department Self-Studies Assessment Reports, which are completed every five years. These are clearly reported indicators of the Mission-conscious nature of the academic enterprise at Mercyhurst. The alignment of department mission compared to University mission, plus evaluation and goals for academic courses, student experiential learning and co-curricular activities are remarkable.

For example, within the Hafenmaier College of Humanities, Arts and Social Sciences, the Thomas B. Hagen Department of History mission is "extricably bound to the University Mission" through the critical concerns of the Sisters of Mercy, evident in course instruction and in the ongoing community service projects and student scholarship that we cultivate. History faculty and students have played a critical role in university initiatives as the university environmental sustainability program, and multi-disciplinary academic program initiatives on issues of race,

the welfare of children, genocide, and the health of our democracy. “Further, our students, particularly those enrolled in the Public History program, frequently engage in experiential learning opportunities in the community that intersect with and advance the Mercyhurst Mission’s “commitment to serving others.” Our Public History students perform invaluable volunteer service and complete internships at local all-volunteer museums and historic sites, historical organizations, or often through neighborhood and community organizations. Their oral history projects, walking and driving tours, and a museum photography exhibition centered on the rich history and cultures of Erie’s underserved neighborhoods and New American refugee communities... “in service toward a just world.”

This alignment and service-orientation is repeated with Zurn College Public Health Department; Walker College Interior Design Department; and Ridge College Social Work Department, and many other departments.

### **Non-academic goals aligned with mission**

In addition to these three academic goals aligned with mission, three more non-academic goals aligned with mission can be cited. One of many simple examples of enacting the Mercy mission is Increased services to international students during breaks, as it extends Mercy hospitality beyond the majority student body. Another outstanding example is the Diversity Task Force and the more recent Equity, Inclusion and Justice initiative and their educational efforts described above. A third excellent example, but not yet administratively supported, is the new Mercy Market. This umbrella initiative to support student needs, especially if economically distressed, for campus food insecurity, includes the MU Pantry for food and personal hygiene necessities; Swipe Out Hunger (after the initial rollout in late November 2020, 1054 meals had been donated by 11-30-20), for a meal swipe bank (for donating dining dollars); a Professional Clothing Closet for interviews; a Book Swap –for exchange of textbooks; and Emergency Book Fund. At this time (Fall 2020), these programs are not funded by an operational budget. Donations are accepted through Staff Senate, Residence Life programs, individual employee and alumni donors, and student donations of meal funds or books.

### **Summary of Compliance**

At this time (November 2020) there is ample evidence that the major goals of this university are aligned with MSCHE goals, the institutional mission, academic goals for student learning and their outcomes. The strategic planning process provides the campus community with opportunities to discuss their goals and methods for improvement and innovation.

The university uses its limited resources in manpower and finances to balance practical financial institutional goals to meet academic goals, all while holding to its Catholic identity, particularly

in the critical concerns of the Sisters of Mercy, and Mercy mission of service. The curricular efforts to specifically incorporate it throughout the four-year span is most notable.

Both the chair and a vice chair of the Board of Trustees have been involved with the current strategic plan as part of the steering committee, offering substantial interfacing and input with the governing body amidst planning.

The NSEE survey was initially offered in 2005 and then again in 2007. Afterwards, it was determined to offer the survey every three years. We have data from 2010, 2013, 2016 and 2019. The survey is offered to only freshmen and senior students. While we do miss cohort classes in between the surveyed years, it is deemed sufficient data for us to evaluate our effectiveness. It should be noted that due to COVID, we have not been able to analyze the 2019 survey results.

Evaluation of student learning outcomes are robust via the comprehensive assessment model and an extensive process found in the Assessment Handbook (Fall 2019). The Assessment Philosophy (pg. 3) describes the four principles for the annual reports, action plans, and five-year self-study reports. The academic assessment process (Assessment Handbook) is followed. This author does not find evidence of a common College Assessment Framework among the four colleges, for consistency.

An assessment model for institutional administrative goals and campus life is not clearly specified as of Fall 2020, but revisions to the Fall 2019 Assessment Handbook are pending (C. Allen, email 12-1-2020). The same process for student life and administration offices as for Academic Affairs began in 2019, using the Five-Year Self Study Reports (Assessment Handbook, Appendix, page 20). The goals for campus life and administration and the institution are assessed using the Five-Year Self Study Reports. They range from Residence Life to Community Engagement; Athletic Administration and administrative offices of Finance and Administration; Advancement; Admissions; Human Resources; and Marketing.

The opaque budget planning process was addressed by budget consultant R. Eplawy in "Budget Process Review" (2018) with his recommendation to create a budget management and development team, which was done (Budget Planning Process (2018), although the evaluation of results are unclear. The Budget Team Leader is no longer employed at Mercyhurst and the position remained unfilled between July and December 2020.

Budget development and post-budget support is currently deficient in terms of a coherent and well-defined process. The budget process would benefit from more leadership and communication in terms of administration of the process and the post-budget assistance. This conclusion is based, in part, from information and specific examples provided during a series of in-depth interviews with divisional vice presidents and appropriate support staff, including follow-up discussions with the Vice President for Finance and Administration. In order to increase internal satisfaction and effectiveness of the process, foster transparency, increase

morale, and clarify roles as it relates to budget development, management and related responsibilities, the following recommendations are made: This team will lead the annual budget planning process to include, but not limited to, revenue projections, resource allocation and long range planning while ensuring its successful implementation.

**Financial impacts due to academic and non-academic strategic plan goal achievements, for program development, marketing, building, remodeling and operational efficiencies**

It is unknown to this writer if there is a process to evaluate the financial impact of the Strategic Plan goals that were met, as noted in the Update. Examples include: an increase in enrollment and revenues; REACH and experiential learning; the many new academic programs; renovated athletic facilities through a major Capital Campaign for Athletics; a focus on veterans; graduate students in new online programs, as the only other targeted groups; changing scholarship policies for athletics; and establishing Erie Promise Grants. It also unclear if there is a process to asses the cost-saving impact of: consolidating the North East campus to Erie; operational efficiencies, technology improvements and streamlining made at multiple offices, from new software systems to moving paperless; and continued cut-backs in employees, both faculty and staff, since 2015.

The next strategic plan will benefit from specific types of goals. A first goal is for marketing, especially all the new academic programs for liberal arts and professional and career-paths, in addition to high-profile resource-rich programs. A second goal is to further increase the streamlining of operations, including standard operating procedures, across institutional departments. A third goal is to increase number and quality of full-time employees, to balance the continual staff cuts for cost-saving efficiencies, e.g., full-time faculty rather than adjuncts; full-time Staff rather than graduate assistants) and a system for regular pay raises for all personnel. AS fourth goal is to increase employee diversity and allocate resources for handicap accessibility to increase enrollment of students with physical disabilities, as well as employees with physical disabilities. A fifth goals is to expand the use of data for reporting, assessment and evaluation, and thus for decision-making.

**Standard I-4 ... *periodic assessment of mission and goals to ensure they are relevant and achievable***

**Potential evidence:**

*Academic Departmental Self-Studies*  
*Board of Trustees Minutes Winter 2018*  
*Board of Trustees Minutes Winter 2019*  
*Board of Trustees Minutes Winter 2020*  
*Strategic Plan Update 2.14.20*  
*Strategic Plan HUB Site*  
*2023 SP Timeline*  
*AGENDA Cabinet Strategic Retreat July 2019*  
*BOT Mission Subcommittee Charter on Mission*  
*BOT Mission Summary 6.16.17*  
*BOT Mission January 2019 Summary*  
*BOT MISSION 10.6.2020- Executive Summary*  
*Action plan-equity, inclusion and justice*  
*Revised University Bylaws September 2020*  
*Renewal through the Mercy Mission Update 2.1.2020*

**Summary of evidence:**

The Mission Subcommittee of the Board of Trustees is responsible for reviewing the university's mission statement every three to five years, according to the committee charter, which states that it will (Responsibility 2): "Review the Mission Statement and Core Values every three to five years to ensure that its language remains current and its format is consistent with similar documents." However, a thorough review has not been conducted since 2012.

This Mission Subcommittee also bears responsibility to monitor strategic planning at the university. Responsibility 8 from its charter says that this committee will "Monitor the development of the strategic plan of the university in its development to ensuring that it remains rooted in the Mercyhurst mission and values." The Bylaws for the Board of Trustees also note that oversight of university strategic planning is a responsibility of the Executive Committee of the Board. The Board of Trustees Subcommittee on Mission regularly discusses the mission and core values amidst its ongoing decisions. At the January 2019 Mission Committee meeting, the decision to move the university's sustainability efforts under the mission office was discussed, citing the critical concerns of the Sisters of Mercy and the importance of these efforts being recognized across the university as foremost mission-centered efforts. At the June 2017 Mission Subcommittee meeting, a discussion about strategic planning led to the creation of two new practices. The first was to ensure that a card with the



mission, vision and core values is at each trustee's place setting for the full board meeting as a visible reminder of these foundational documents throughout the discussion and planning. Secondly, the discussion at that meeting led to the new practice of generating discussion at the end of each full board meetings about how the meeting's deliberations reflect the mission and core values. This reflective exercise has facilitated many important group discussions about how decisions related to financing, buildings and programming directly connect to the mission and core values.

Another example of Board input for mission-centered planning is the university's commitment to diversity and inclusion. The 2017-2020 strategic plan adopted this as a strategic concern. Action 2.3 was to "Transform the campus climate to support a diverse and inclusive culture." At the May 2020 Board of Trustees meeting the university discussed the need to update and review the relevance of its current initiatives in this area due to escalating national tensions and increasing evidence of diverse students looking for additional supports. Dr. Greg Baker, VP for Mission, was charged with updating the university's plans. Several committees working in this area gathered to facilitate strategic analysis during summer 2020. We found that some aspects of the 2017-2020 strategic plan have been met, such as "create specific orientation programs for non-traditional students (e.g., international and transfer students)" and some had been partially met, such as "create strategies for training our community in cultural sensitivity skills." Some actions had not been adequately addressed, such as "Strengthen mechanisms for reporting and recording incidents of concern."

In July of 2020, the university released its new action plan listing 12 concrete, prioritized actions for equity, inclusion and justice and announced its plans to create the new part-time position of officer for equity, inclusion and justice. This new officer, Sr. Natalie Rossi, was installed in August 2020. Also, at the October 2020 Board of Trustees Mission Subcommittee meeting, the university's plans for antiracism trainings and its overall strategic goals for antiracism were discussed due to a recent White House Executive order limiting such efforts. This discussion led to the decision of gathering those leading the university's efforts for a meeting to discuss how to continue strategic plans for equity, inclusion and justice with heightened sensitivity to some of the language used in describing and executing these trainings and events.

The Strategic Planning process at Mercyhurst University has been engaged twice in the last six years and has combined assessment of previous goals, analysis of the current state of the university, input from all university stakeholders, and a constant referral to the mission and values of the institution. These efforts are led by Jeanette Britt, CIO and VP for Strategic Initiatives. In the process of creating each triennial strategic plan, the university evaluates the progress of the most recent plan and gathers broad feedback from the university. The most recent strategic planning process, which is ongoing and delayed due to the current presidential search, began with a cabinet retreat in July 2019, which included a review of the last strategic plan, an assessment of various challenges in the landscape, especially in terms of changing demographics and their impacts on higher education, and a thorough discussion of prioritization (amidst finite resources) of strategic goals moving forward. The process was of particular interest to admissions and enrollment considering challenging trends in the market.

This led, for example, to strategic assessment of niche majors and programs, including the decision to strategically expand the university's Autism Initiative at Mercyhurst (AIM) program and to explore new local initiatives for high school students to dual enroll for advance credit.

After this initial cabinet-level planning, a steering committee was then formed, which met frequently in fall 2019 to put together a skeleton of potential strategic areas to bring to the broader community for discussion and feedback. Various listening sessions were offered on both campuses in order to gather community feedback and concerns. This transparent strategic planning process, including the timeline and key documents, is available to be viewed by all employees on the university's HUB site.

Strategic goals are also regularly reviewed for relevance within academic departments. Each academic department at Mercyhurst engages in a rigorous course of assessment of its program, evaluating the efficacy of its curriculum and faculty in fulfilling Student Learning Outcomes (SLOs) and graduating students prepared for their respective professional fields. The ongoing assessment moves through a five-year rotating regimen of SLO evaluation, with key courses methodically selected to evaluate each learning outcome (e.g., Critical Thinking, Communication Skills). The regimen culminates every five years in a thorough overall program self-study that includes analysis of the SLO data, program review by an outside peer evaluator, alumni and current student data, shifting trends in the discipline, analysis of faculty scholarship, collaborative partnerships with other academic entities on campus as well as with organizations in the community, and consideration of the department's mission and its alignment with university Mission.

### **Summary of compliance:**

We have found that it has been more than five years since the Board of Trustees last evaluated the mission, vision and core values, even though the Mission Subcommittee's bylaws state that it will review these every three to five years. The last time the mission and vision were substantially reviewed was in 2012 when the language was updated to reflect "university" in both the mission and vision statements. New structures will need to be established and monitored to ensure that these are reviewed with the appropriate frequency. As the executive summary of the October 6, 2020 Board of Trustees Mission Subcommittee meetings reflects, this committee discussed that it is aware of this deficit and is putting mechanisms in place for predictably reviewing these foundational documents.

A more rigorous system of accountability should be implemented to ensure that the mission is reviewed every 3-5 years and stated. This could be directed by the Vice President for Mission Integration, who then shares important insights from the review with the campus community.

The detailed and robust strategic planning process has served the institution well in creating a set of mission-grounded, achievable, and assessable institutional goals. University strategic planning process (using three-year cycles) have been effective for regularly refining the strategic initiatives of the university. The three-year cycle for new plans ensures that there is a

very regular process for updating and revisiting strategic goals. As the Renewal Through Mercy strategic plan update for the Board of Trustees in February 2020 demonstrated, the administration periodically reviews the strategic plan to see if it is being accomplished and remains relevant. While there is a clear current *practice* of triennial strategic plan updates, there is no evidence that the university has in writing any clear expectations for the frequency of evaluating those strategic plans. The university might wish to revisit this in its Board of Trustees bylaws and assign this to a specific committee to ensure it is monitored, reviewed and updated as needed.