

**THE TALENTS  
ENTRUSTED TO OUR CARE:  
A STRATEGIC PLAN FOR MUHLENBERG**

(rev. 10/5/04)

**A Vision for Muhlenberg's Future**

At the end of the first decade of the twenty-first century, Muhlenberg will be nationally acknowledged as a distinguished, intellectually rigorous private undergraduate institution that integrates liberal arts with pre-professional studies in the context of a supportive, diverse community. The Muhlenberg experience will reinforce the importance of character and ethical decision-making, the beneficial power of spiritual life within a variety of faith traditions, and the obligation of graduates to lead lives of leadership and service.

## TABLE OF CONTENTS

Executive Summary .....	3
I. Introduction .....	7
II. Muhlenberg's Mission .....	7
III. Muhlenberg's Values .....	8
IV. The Planning Process .....	8
V. Muhlenberg and the Competitive Environment.....	11
VI. Strategic Planning Principles .....	15
VII. Strategic Goals .....	16
VIII. Strategic Initiatives .....	17
A. The Academic Program.....	17
B. Academic Services .....	19
C. Co-Curricular and Extra-Curricular Life.....	21
D. Finances, Facilities, Technology .....	24
E. Admissions and Financial Aid.....	27
F. Development and Alumni Relations.....	29
G. Muhlenberg and the Community .....	30
IX. The Financial Plan .....	30
X. Conclusion .....	34
Attachment 1: Fundamental Institutional Values .....	35
Attachment 2: Participants in the Planning Process .....	37

## EXECUTIVE SUMMARY

In 2003, after ten years of swift and substantial progress, Muhlenberg College welcomed a new President and launched a broadly consultative strategic planning process to chart its course for the next decade. This plan represents the fruition of judicious thought and energetic work by faculty, students, staff, administration, and the Board of Trustees, informed by extensive and helpful advice provided by the campus community, alumni, parents, friends, and community leaders. It is mission-driven, rooted in our traditional institutional values, based on careful analysis of Muhlenberg's competitive strengths and strategic opportunities, linked to a budget model grounded in fiscal realities, and focused on increasing the value of a Muhlenberg education.

The plan deliberately sketches broad strategies and suggests institutional directions and financial priorities, rather than laying out specific operational details, many of which must be worked out within the existing governance structure of the College in consultation with the faculty and staff, student government, and the Board of Trustees. Regular reassessment of Muhlenberg's progress and of its competitive and fiscal environment will be essential to the success of the plan and, ultimately, to the continued success of the College. The plan acknowledges the difficulty of forecasting developments over the course of a decade by building flexibility into its proposals, especially for the second half of this period.

### *Demographics*

Although the overall number of high school graduates will not decline significantly during the planning period, the number of families considering (and willing to pay for) private liberal arts education is limited. Competition will be keen for the most academically gifted of these high school graduates. To succeed in this competition, Muhlenberg must – both in reality and in public perception – offer an educational experience of very high value.

### *Strengths and Weaknesses*

Market research and feedback from prospective students and their families confirm that Muhlenberg's strong sense of community, warm and friendly atmosphere, and close student-faculty relationships distinguish the College not only from the large and less expensive state-supported institutions, but even from many of our more prestigious and wealthier private college competitors. On the other hand, the market (incorrectly, we would argue) does not perceive Muhlenberg as having the academic reach and depth of many of our key competitors.

Consequently, we must focus our efforts on strengthening Muhlenberg's academic programs and facilities while preserving the College's ethos as a "caring community" and enhancing the beauty of the campus. Furthermore, we must communicate our strengths more effectively to potential students.

## *Strategic Initiatives*

The Academic Program. The plan proposes initiatives to enhance the quality and distinctiveness of Muhlenberg's approach to liberal arts by emphasizing the intellectual links between theory and practice ("Praxis Pedagogies"), by building on our reputation in pre-medical science education and the arts, and by capitalizing on campus commitment to civic and personal values. This will require the addition of up to ten additional tenure-track faculty lines, and significant investments in science facilities, art and music facilities, curriculum development, and support for faculty and student research.

Academic Services. The College will build on its reputation as a caring intellectual community that supports students with different learning styles and strengths by combining staff and programs into an expanded and enhanced Academic Resource Center, including academic support services, disability services, tutoring, and the Writing Center. It will also strengthen its support for students' realization of their post-graduate ambitions through an enhanced Career and Pre-Professional Advising Center, aspects of the post-graduate awards program, and the development of additional articulation agreements with appropriate graduate and professional institutions.

Co-Curricular and Extra-Curricular Life. Muhlenberg will build on existing strengths to make our students' experience notable for the quality, variety, and educational value of its co-curricular and extra-curricular experiences, providing students with opportunities to integrate intellectual, spiritual, physical, civic, and social life in creative and powerful ways. This will entail: the development of stronger links between the residential experience and the intellectual life of the campus through more living-learning communities; strengthening the Greek system as a locus for character and leadership development; strengthening the College's athletics program to keep it both competitive and congruent with the College's academic and enrollment objectives; increased support for religious life and student leadership development; and substantial investment in the facilities that support extra-curricular and co-curricular life, including improved athletic facilities, student residences, and Seegers Union.

Finances, Facilities, Technology. The College must have the financial capacity, technological infrastructure, and facilities to achieve its strategic objectives while assuring the availability of adequate resources for our successors by maintaining the discipline of a balanced budget. It will also be important to maintain the campus as a beautiful and efficient venue for the pursuit of our mission. The plan increases technology support essential to the viability of the campus network, includes resources for the further extension of teaching technology, allocates increased resources to support a comprehensive capital improvement plan, and calls for campus facilities planning that will create an improved green campus core by moving parking and service functions to the campus periphery. The plan also provides resources to preserve and strengthen our campus tree legacy, and will, in the second half of the decade, provide incentives for faculty and staff to purchase homes on the campus periphery, striving for the creation of a "Muhlenberg Village."

Admissions and Financial Aid. Muhlenberg intends to increase its academic selectivity and cultural diversity through effective marketing, strategic utilization and targeted augmentation of financial aid resources, and more extensive engagement of faculty in recruiting for targeted academic programs. The College will, by 2009: increase the number of applications from 4,100 to 4,500, and the average SAT scores of matriculants from 1212 (Class of 2007) to 1250; maintain an acceptance rate under 50%; and increase multicultural enrollments from 7.9% to 10%.

Development and Alumni Relations. Muhlenberg will develop the financial resources necessary to implement the strategic plan and to build a robust philanthropic culture among Muhlenberg's alumni and other stakeholders by strengthening relationships, communicating institutional priorities, expanding the volunteer network, and securing charitable gifts and grants. The College has recently made a substantial investment in additional development staffing in support of this goal, and also envisions the creation of an alumni center on or adjacent to the campus to nurture alumni engagement and loyalty.

Muhlenberg and the Community.

The College will develop and nurture mutually beneficial partnerships with other cultural and educational institutions, with local government, with other local organizations, and with neighboring businesses and individuals to improve the quality of life for our students, faculty, and staff and the broader community. Examples include: collaborations with the Lehigh Valley Association of Independent Colleges (LVAIC) consortium, with the Allentown Art Museum, and with local law enforcement; the extension of volunteer engagement with the community and service learning; and participation in economic development of the 19<sup>th</sup> Street area.

*The Financial Plan*

The Budget Model. Muhlenberg is resolved to maintain its long history of balanced budgets and will not undertake strategic initiatives without knowing how we are going to pay for them. A ten-year budget model incorporating reasonable assumptions about costs (compensation, health benefits, financial aid, operating budgets, etc.) and revenue (student charges, Wescoe School net income, endowment income, charitable giving, etc.) is an integral part of the plan. Because Muhlenberg is significantly underendowed compared to its competitors, the financial plan will emphasize endowment growth through investment and philanthropic support. Because this is a long-term strategy, a balanced budget will continue to be heavily dependent on student charges (closely linked to the achievement of enrollment targets) and on successful and aggressive fund raising. Urgent capital projects can be funded most expeditiously by undertaking an appropriate level of debt.

Enrollment Targets. After assessing the costs and benefits of enrollment growth or reduction, the plan calls for maintaining current enrollment levels, while making strategic investments that increase quality and add value to the Muhlenberg experience. To do otherwise would result either in crippling financial effects (in the case of enrollment

reductions), or negative impact on quality, community, and relationships with our neighbors (in the case of enrollment increases).

Student Charges. Muhlenberg has consistently remained a “value leader” among our benchmark institutions, with total student charges averaging approximately 10% below the total student charges of our benchmark institutions. Muhlenberg must strive to remain a value leader during the next decade, though perhaps not by so wide a margin. The plan anticipates continued increases in student charges at or slightly above the percentage increases of our benchmark institutions. This will allow reasonable annual increases in the operating budget (including the salary pool) to sustain the quality of existing programs.

Debt. The plan calls for a bond issue of \$25 million in the first year of the plan, with the possibility of a second bond issue of \$15 million during the second five years of the planning period, if these obligations can be undertaken without negatively affecting the College’s bond rating. Estimated debt service for these bonds is built into the plan’s budget model. The College anticipates funding most or all of the plan’s capital projects (science facilities, student union renovation and expansion, residence halls, etc.) through bond issues.

Fund Raising. The success of this plan will require Muhlenberg to be even more successful in securing philanthropic support than in the recent past. The strategic plan calls for more than \$4.7 million in capital gifts to be secured for the completion of the Life Sports Center addition within the next twelve months, for aggressive increases in unrestricted annual giving (at least \$10.5 million over the next 5 years), and for a strong focus on endowment fund raising during the same five-year period (at least \$16.9 million for endowed faculty chairs, scholarships, research funds, library funds, unrestricted, and other types of endowment) to address the College’s chronic strategic disadvantage in this regard. The financial plan currently requires fund raising to cover such costs as additional faculty lines, augmented financial aid for multicultural and other students, increased resources for faculty and student research, enhanced support for student services, and the significant operating costs associated with new facilities.

## **I. Introduction: Why This Plan?**

Through the wisdom, dedication, and hard work of those who have gone before us, Muhlenberg has achieved a distinguished reputation among America's undergraduate liberal arts institutions. Now it is time for us – faculty, staff, alumni, students, parents, and Trustees – as the current stewards of this remarkable place, to take thought for the College's future. The beginning of a new century, as well as the accelerating pace of change, make this an appropriate moment for us to think deeply and creatively about the challenges that face our college, our society, and our world, and to define the role Muhlenberg will play in preparing young men and women to meet those challenges. It is our responsibility to renew this College, which has equipped so many young women and men with the intellectual and moral tools to lead and serve, as a powerful force for good.

The discipline of constrained resources requires us to make careful choices. The investments called for in this plan are intended to leverage our considerable strengths, build on our traditional values, and position Muhlenberg for an even more successful future. Because we can only achieve ambitions worthy of this great institution if we work together, the strategic planning process has engaged Trustees, faculty, staff, students, alumni, parents, and other members of the community in charting our course for the next decade. Consequently, this strategic plan represents a shared and aspirational vision of our common future. Achieving that vision will require all of us who love this place and believe in the importance of its work to give our very best.

## **II. Muhlenberg's Mission<sup>1</sup>**

Muhlenberg College aims to develop independent critical thinkers who are intellectually agile, characterized by a zest for reasoned and civil debate, knowledgeable about the achievements and traditions of diverse civilizations and cultures, able to express ideas with clarity and grace, committed to life-long learning, equipped with ethical and civic values, and prepared for lives of leadership and service. The College is committed to providing an intellectually rigorous undergraduate education within the context of a supportive, diverse residential community. We are also committed to educating the whole person through experiences within and beyond the classroom. Our curriculum integrates the traditional liberal arts with selected pre-professional studies. Our faculty are passionate about teaching, value close relationships with students, and are committed to the pedagogical and intellectual importance of research. Honoring its historical heritage from the Lutheran Church and its continuing connection with the Evangelical Lutheran Church in America, Muhlenberg welcomes and celebrates a variety of faith traditions on campus and encourages members of the College community to value spiritual life.

---

<sup>1</sup> This revised Mission Statement was developed during the fall and winter of 2003-2004 in consultation with the President's Staff, the President's Planning Group, the Board of Trustees, and with feedback from various gatherings of faculty, staff, students, alumni, parents, and community leaders from the Lehigh Valley.

### **III. Muhlenberg's Values**

Inextricably linked to the College's mission are the values that guide us in its pursuit. These values, articulated at length in Attachment 1, derive from our conviction that education is best accomplished within the context of a caring community, a community that embraces not only the campus, but also extends to our neighborhood, our city, our state, our nation, and our world. This plan seeks to reify the implications of such values for liberal education by providing increased opportunities to link theory and practice in ways that strengthen not only the intellectual abilities of our students, but also their ability to grasp the implications of ideas, knowledge, and analytical skills in defining their roles as responsible citizens.

### **IV. The Planning Process**

During the transitional year 2002-2003 Muhlenberg's Trustees agreed that the new president should give high priority to the development of a strategic plan guiding the College's future direction and priorities. Shortly after his appointment as Muhlenberg's 11<sup>th</sup> President, Peyton R. Helm convened a planning retreat of the President's Staff (July, 2003) and developed a design for a planning process that stressed inclusiveness, transparency, and consultation with all of Muhlenberg's key constituencies and stakeholders. The process, with minor modifications, was endorsed by the Board of Trustees and welcomed by the campus community, which chose faculty, staff, and student representatives to the *President's Planning Group* ("PPG").

#### **A. Participants (See Attachment 2)**

Three groups have played important continuing roles throughout the process:

- The President's Staff gathered and analyzed information for consideration by the PPG.
- The PPG weighed information and recommendations, posed further questions, revised and (ultimately) approved fundamental planning documents (principles, goals, values, mission statement, etc.), and proposed priorities.
- The Board of Trustees, both through its standing committees and meeting as a Committee of the Whole, reviewed planning principles and fundamental documents, considered major financial assumptions (such as student charges, debt levels, enrollment targets), and weighed priorities proposed by the PPG. Final approval of the plan is the responsibility of the Board.

In addition, the process reached out to members of the Muhlenberg community by various means and on many occasions throughout the year, including reports at faculty meetings, alumni and parent gatherings in 16 cities around the country, campus forums with faculty, students, staff, and alumni, and conversations with community and business leaders through the Muhlenberg Board of Associates. Throughout the process, faculty, staff, students, parents, and Trustees were encouraged to follow and comment upon the planning dialogue through regular posting of key documents and PPG meeting summaries on the planning website (<http://www.muhlenberg.edu/committees/stratplanning/>), e-mail bulletins, and articles in *Muhlenberg* magazine. The President's Staff, PPG, and Board of Trustees gave such input serious consideration at multiple stages during the process, often modifying drafts

of key documents and readjusting priorities as a result of suggestions from members of the community.

The completion and acceptance of the plan will require the substantive engagement of other important groups in operational planning to implement specific initiatives of the plan. These groups include standing committees of the faculty, student leaders, and *ad hoc* committees or task forces organized by the President to provide recommendations on the implementation of specific initiatives.

## **B. Phases of the Planning Process**

1. The first stage of the planning process included the development of four fundamental planning documents.
  - a new mission statement
  - a set of planning principles
  - a vision statement and set of strategic goals
  - a statement of institutional values

After extensive discussion by the President's Staff, PPG, and Board of Trustees, these documents were posted for comment on the strategic planning website and discussed at a number of forums for alumni, parents, students, faculty, staff, and members of the Allentown community throughout the winter and early spring. Extensive feedback resulted in numerous drafts and, ultimately, in the considerably strengthened final versions found in this plan.

2. The second stage involved a review of the College's various operational areas, including the academic program, academic services, international study, the Wescoe School, student life, facilities and technology, religious life, enrollment, public relations, development, human resources, and others. In each of these areas the PPG reviewed comparable data from our benchmark institutions, considered Muhlenberg's strengths and weaknesses, opportunities and threats, and approved planning principles specific to that operational area. These materials were further reviewed by appropriate Trustee committees and, in the case of the academic program, academic services and, some aspects of enrollment by the Board Committee of the Whole. Summaries of these operational analyses were posted on the planning website for community comment.
3. The third stage of the process included presentations to the President's Staff and the PPG of strategic initiatives representing each operational area's possible contributions to advancing the College's mission and addressing the strategic goals articulated during stage one of the process. An overview of these proposed initiatives was published on the planning website and, during the late spring and early summer of 2004 extensive comments and advice were received from faculty, staff, and students and considered by the President's Staff and the PPG in preparing proposals for the Board of Trustees.

4. The fourth stage entailed a detailed review by the President's Staff and the PPG of the costs of the proposed strategic initiatives within the context of a ten-year budget model (see below, Section IX The Financial Plan) that weighed anticipated revenues and fund raising results against possible costs. This process required difficult choices, but was made easier by the community's earlier agreement on strategic planning principles, strategic goals, and our institutional mission and values, all of which guided the priority-setting process. The proposals resulting from these deliberations were then referred to the Trustee Committee of the Whole which, after a daylong planning retreat (June 17-18, 2004), approved them unanimously. These proposals form the core of this plan.
5. The fifth stage of the process is ongoing during the summer and fall of 2004. Alumni and parents, as well as faculty and staff, were apprised of the emerging themes of the plan in the Summer 2004 issue of *Muhlenberg* magazine. A draft of the plan was reviewed by the President's Staff and PPG in August and will be shared with faculty, staff, students, and Trustees for discussion at a campus forum in September and at the October Board meeting. After revisions resulting from these discussions have been incorporated into the next draft of the plan, we anticipate final approval at the January Board meeting.

### **C. Implementation and Assessment**

This plan is strategic, not operational. It deliberately sketches broad strategies, suggests institutional directions, and sets financial priorities. At the same time, if it was unclear whether a specific initiative was strategic or tactical, this plan errs on the side of inclusiveness. The plan should not and will not override the prerogatives of the faculty, which, through its committees, must consider and amend or approve some of the initiatives suggested in the plan. Neither will the plan overlook the important continuing role of student leaders and members of the staff in the process of implementation. Operational plans for the implementation of other initiatives in the plan will be the responsibility of various College committees, faculty, and staff.

Several initiatives, deemed to be high priority, approved by the Board, and/or falling within the prerogatives of the administration, have already been launched. These include, for example, an increased investment in the Development operation, an optional program of faculty development for service learning, market research into community development, and time-sensitive planning for facilities projects.

Regular assessment of Muhlenberg's progress is essential to the success of the plan and, ultimately, to the continued success of the College. This assessment will take several forms:

1. The goals themselves must be assessed at least annually. As the future reveals itself we must assure ourselves that we have chosen the right goals, and that changing circumstances have not altered our commitment to these goals, the priority we assign them, or our ability to achieve them. While goals that have been articulated through careful deliberation and consultation should not be changed capriciously or

autocratically, we must remain open and flexible. A good strategic plan is never carved in stone.

2. The assumptions on which our financial model is based must be assessed at least annually, and budget adjustments made to assure that we can continue to afford the implementation of the plan.
3. We should monitor at least annually the progress of the various faculty committees and offices of the College in developing and implementing operational plans to bring strategic initiatives to reality.
4. The effectiveness of strategic initiatives, once implemented, in achieving our strategic goals must also be reviewed at least annually. This may be achieved, at least in part, by the development of agreed upon management metrics that measure Muhlenberg's academic and fiscal progress.
5. The College will strive to create a culture of planning and assessment to ensure that such activities are ongoing and become institutionalized. The implementation of the Board of Observers Visiting Committee program, approved by the Trustees in January, 2004, and enthusiastically supported by the faculty in a series of departmental meetings with President Helm and then-Interim Dean Hass during the 2003 fall semester, will play an important role in developing this culture.

## **V. Muhlenberg and the Competitive Environment**

Muhlenberg's educational mission is not essentially competitive but rather represents a commitment to social and personal betterment. Nonetheless, as the poet Hesiod famously observed (*Works and Days*), competition can be a constructive force to the extent that it inspires continual self-improvement. Competition plays a further role in strategic planning. Whether we like it or not, Muhlenberg is in competition for vital resources that are essential to its goal of achieving distinction in liberal arts education: bright students, excellent faculty, and charitable gifts and grants, for example. This plan takes it as given that the most effective way to prevail in the competition for these resources is to continually and maximally improve the quality of the College and the value of a Muhlenberg education in those ways that matter most to our stakeholders.

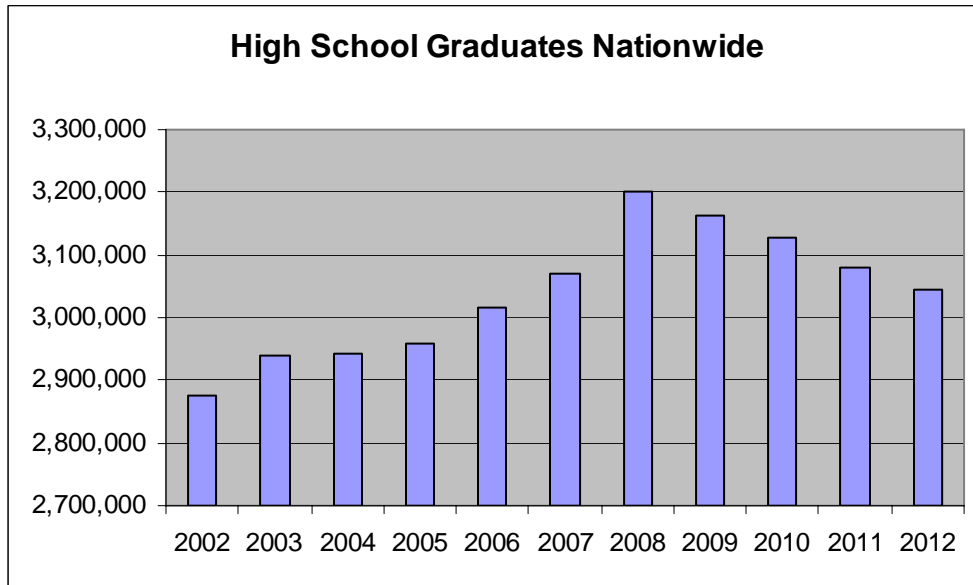
### **A. Benchmark Institutions**

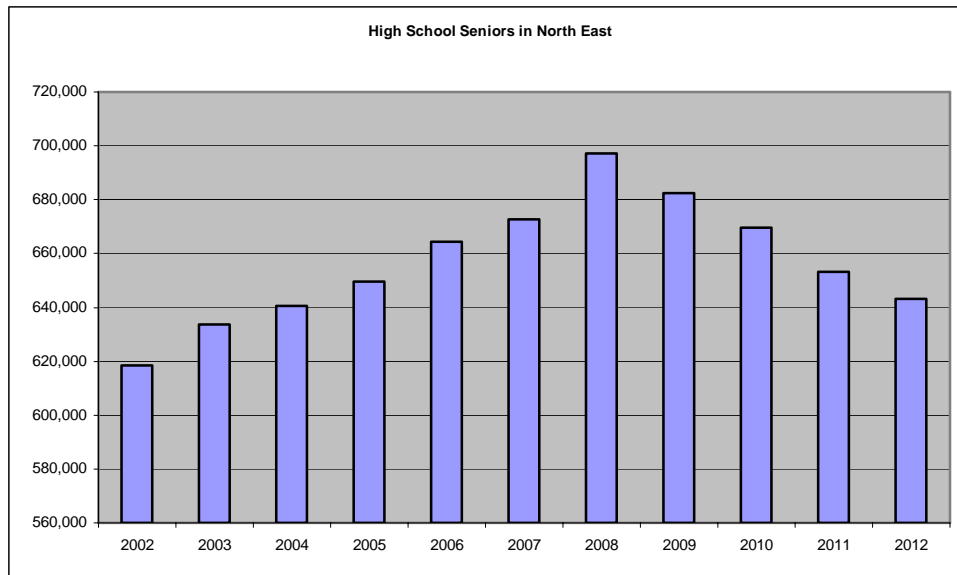
At the outset of the planning process, the President's Staff, PPG, and Board agreed on a roster of institutions with which Muhlenberg has significant admissions overlap (i.e. with which we compete for students) and to which Muhlenberg is essentially similar in mission and character. Each operational area of the College utilized this benchmark group in assessing its competitive strengths and weaknesses. Our benchmark group includes:

Bucknell University  
Dickinson College  
Drew University  
Franklin and Marshall College  
Gettysburg College  
Ithaca College  
Lafayette College  
Lehigh University  
Skidmore College  
Susquehanna University  
Ursinus College  
Wheaton College

**B. Demographics**

Muhlenberg competes with its benchmark and other institutions for the best high school graduates in its efforts to increase selectivity and academic quality. The number of high school graduates, especially in the northeast United States from which we draw the preponderance of our students, is an essential factor in this competition. Fortunately, the number of high school graduates – both nationwide and in the northeast will increase through 2008, and even though the number declines over the next several years, it will remain at a higher level than at present.





Of greater concern than the raw number of high school graduates is the percentage of these students (and their families) willing to consider private four-year institutions for postsecondary education. This percentage has declined from 20% of high school seniors graduating in 2002 to 15.6% of those graduating in 2005 according to one survey.<sup>2</sup> Other statistics show the market share of private higher education slipping from 40% in 1959 to 33% in 1965 to approximately 21% in 1975 – a level at which it has remained with minor variations since that time. Although public universities’ charges have recently risen at significantly higher rates than private institutions, their overall cost is still substantially lower. As public universities become more aggressive in establishing honors colleges and awarding merit-based financial aid packages to high academic achievers, the market position of private colleges like Muhlenberg will continue to be vulnerable.

In sum, competition will continue to be keen for the most academically gifted high school graduates who are willing to consider private liberal arts institutions and whose families are able to pay the premium cost of such an education.

This is a significant observation. To succeed in this competition, Muhlenberg must – both in public perception and in reality – offer an educational experience of very high value. To accomplish this, we must understand the market’s perception of our strengths and weaknesses and we must capitalize on this knowledge to leverage our assets, minimize our vulnerabilities, correct misperceptions that undervalue our existing strengths, and respond to changing market conditions.

### **C. Major Competitive Strengths and Weaknesses**

Muhlenberg’s admissions staff currently bases much of its market research on the Admitted Student Questionnaire (ASQ), which offers comparative data on Muhlenberg matriculants and on students admitted to Muhlenberg who chose to attend competitor institutions.

<sup>2</sup> Survey of 1.2 million high school juniors conducted by the National Research Center for College & University Admissions (NRCCUA).

These ASQ measures are reinforced by other assessment measures, including feedback received by admissions officers from potential applicants and high school guidance counselors, surveys of employees conducted as part of the College's recent self-assessment process, and the benchmarking studies conducted by the President's Staff at the outset of the planning process.

In sum, Muhlenberg's campus climate with its emphasis on a strong sense of community, a warm and friendly atmosphere, strong/close student-faculty relationships, and an ethos that extends itself on behalf of students and student success is what truly distinguishes us not only from the large and less expensive state-supported institutions, but even from many of our more prestigious and wealthier private college competitors. Muhlenberg also gets positive ratings (but ratings that are somewhat lower than many of our head-to-head competitor institutions) in categories such as quality of social life, campus surroundings, availability of majors, academic reputation, quality of on-campus housing, and quality of academic facilities. Our institutional strategy must, consequently:

- preserve and enhance Muhlenberg's "caring community" ethos and the beauty of our campus environment
- continue to build our reputation for academic excellence by strengthening and renewing our faculty, academic programs, and academic facilities
- enhance student extracurricular and co-curricular life while building public awareness of our existing strengths and the advantages of our location

The principles governing our strategic planning process recognize and derive from these market imperatives.

## **VI. Strategic Planning Principles**

During the first stage of the process, the community agreed on the following strategic planning principles to guide the development of our goals and the assessment and prioritization of proposed strategic initiatives.

1. To continue Muhlenberg's impressive progress in recent years, the plan must give highest priority to the quality and distinctiveness of the academic program, while addressing other aspects of the student experience that enhance undergraduate education and the lessons to be learned from participation in a tolerant, nurturing, and ethical community. The most promising strategic initiatives will attract and retain talented students while increasing institutional visibility.
2. The College's plans, while ambitious, will require the discipline of a balanced budget. No initiatives will be undertaken without a thoughtful analysis of their financial impact on the College within the context of a comprehensive budget and staffing model. Though facilities and academic priorities will undoubtedly claim our attention, a key element in the plan must be to strengthen the College's overall financial position by growing the endowment. Because the financial future is unpredictable, the Strategic Plan must be flexible in its ability to respond to changing fiscal realities.
3. The plan should reflect Muhlenberg's core values and focus on Muhlenberg's traditional mission and strengths, refining, improving, and building upon these distinctive aspects of the College, rather than seeking new programmatic directions outside the scope of our current mission. (That is, we do not intend to launch new schools, or graduate degree programs, or reinvent the College as a technology-based distance- learning institution, etc.).
4. The plan will recognize the importance of Muhlenberg's location in Allentown and the Lehigh Valley, and will seek to improve the advantages of this location through cooperative relations with the community. We will also seek to capitalize on our location in the Middle Atlantic region and the opportunities presented by our proximity to the resources of major metropolitan areas, such as New York City, Philadelphia, and Washington DC, as well as natural resources in the region.

## VII. Strategic Goals

During the first stage of the planning process, the community also agreed on six over-arching strategic goals that would guide the development and prioritization of Muhlenberg's investment in specific strategic initiatives:

1. Strengthen the academic program through significant, targeted investments in faculty, staff, and facilities that build upon existing strengths and capitalize on the most promising opportunities for further development of the curriculum within the parameters of our mission statement, fundamental values, and planning principles.
2. Enrich the Muhlenberg experience by further developing and more closely integrating co-curricular and extra-curricular programs with intellectual and curricular life.
3. Further develop Muhlenberg's distinctive identity as a caring community focused on the development of character, individual potential, and engaged citizenship.
4. Support the integration of the liberal arts with selected areas of pre-professional study and leadership development by expanding opportunities for service learning, internships, and international education.
5. Position Muhlenberg as an increasingly attractive option for gifted college-bound students from diverse backgrounds by increasing financial aid resources, strengthening co-curricular programs, and utilizing the unique advantages of our location
6. Significantly strengthen the financial position of the College through careful management of debt, superior investment performance, endowment growth, aggressive and successful expansion of fund-raising efforts, and the development of stronger relationships with constituents.

## VIII. Strategic Initiatives

### A. The Academic Program

**Primary Objectives:** *Enhance the quality and distinctiveness of Muhlenberg’s approach to liberal arts by emphasizing the intellectual links between theory and practice, by building on our traditional strengths in pre-medical science education and the arts, and by capitalizing on campus commitment to civic and personal values. (Supports Strategic Goals 1- 4).*

#### 1. ***Develop and expand “Praxis Pedagogies” as a distinguishing feature of undergraduate liberal arts education at Muhlenberg.***

“Praxis Pedagogies” is a term that incorporates a variety of initiatives that build stronger links between theory and practice – in the classroom, studio, laboratory, and field. Such approaches will extend rather than replace current curricular emphases on critical thinking, textual analysis, and the development of skills in written and spoken expression, and will supplement and enhance traditional pedagogies in many disciplines. Praxis pedagogies include:

- Student research. Support for a wide range of approaches is intended to substantially increase the percentage of Muhlenberg students engaged in significant research, independently and in collaboration with faculty, during the academic year and during summers, on and off campus.
- Service learning. Service learning links classroom theory and textual analysis with fieldwork in the community. This pedagogy is already a growing and successful presence in the Muhlenberg curriculum and is a natural fit with the College’s strong culture of community engagement and with our mission to prepare students for lives of leadership and service.
- Values exploration. Expanded opportunities to encounter curricular diversity and to engage in coursework that explores the ethical dimensions of different disciplines and professions (often building on or relating to programs developed by Muhlenberg’s Center for Ethics) will be important priorities; opportunities for students to develop a more sophisticated understanding of the relationships between our own and other cultures will require changes in our study-abroad structure to maximize student reflection on the study abroad experience, and increase opportunities for off-campus study.

#### Implementation

- Add 10 new tenure-track positions over the next five years in key areas that strengthen traditional departments and support development of interdisciplinary curricular initiatives, as determined by the President and Provost in consultation with faculty representatives and the Academic Policy Committee.
- Ask the Academic Policy Committee of the faculty to consider a reduction in the graduation requirement from 34 to 32 course units; this change, combined with the proposed increase in faculty, might result in an adjustment of the

teaching load and redeployment of faculty time for more substantial engagement in Praxis pedagogies.

- Substantially increase the number of summer research stipends for students.
- Substantially increase the number of research assistantships enabling students to assist faculty with their research according to guidelines to be developed in consultation with the Faculty Development and Scholarship Committee.
- Increase other resources for faculty development to fund faculty development priorities to be defined in consultation with the Faculty Development and Scholarship Committee.
- Increase resources for library acquisitions in support of student and faculty research as prioritized by the Library staff in consultation with the Library Committee, and faculty liaisons to academic departments and programs.
- Utilize Mellon grant and other resources to provide incentives and mechanisms for the development of service learning and values exploration courses within existing departments and majors (in progress as of summer, 2004).
- Initiate faculty study process to explore new and affordable models for expanding study abroad opportunities.
- Create an ad hoc faculty committee to explore the possibility of recognizing community engagement on student transcripts and prepare recommendations for submission to the Academic Policy Committee.
- Initiate a comprehensive academic program assessment structure to provide reliable information about the quality of our academic program. Assessment tools may include departmental self-studies, material prepared for PDE and Middle States reviews, institutional participation in the National Survey of Student Learning, and other appropriate indicators as recommended by faculty committees charged with curricular oversight (e.g., Curriculum Committee, Academic Policy Committee, Writing Program Committee). The newly authorized Board of Observers Visiting Committee program will also play a role in this initiative.

## 2. *Strengthen the Natural Sciences.*

Muhlenberg's distinguished reputation in the natural sciences is jeopardized by inadequate and outdated laboratory and classroom facilities. Moreover, the inadequacy of our science facilities is a major obstacle to strengthening laboratory science, which is an increasingly important component of science pedagogy.

### Implementation

- Invest approximately \$15,000,000 in new and renovated science facilities (in addition to the \$3.2 million invested in Trumbower renovations since 2000).
- Consider additional faculty lines in the natural sciences as part of the planned increase in the size of the tenure-track faculty (see above).
- Continue the current planning processes initiated by the faculty in the Science Division to develop a vision for the future of science education at Muhlenberg.

3. ***Address Critical Facilities Needs in Art and Music.***

The rapidly growing size and quality of Muhlenberg's Art and Music offerings has resulted in facilities needs that must be satisfied to assure the future success of these programs. Art studios are crowded and lack natural light; there is a shortage of music classrooms and rehearsal space.

Implementation

- Use the upcoming inauguration of the visiting committee program to allow the Art and Music departments to identify and prioritize key departmental needs.
- Invest approximately \$1,000,000 in expansion of art studio facilities and retrofitting of existing facilities to meet music department needs.

4. ***Develop new academic programs that build on existing strengths and hold the promise of significant appeal to current and prospective students.***

As faculty members and committees propose curricular initiatives, decisions about resource allocations must be made in ways consistent with the overall aims of the plan. While additional curricular initiatives may be considered in the future as faculty planning is more fully developed and resource requirements are more clearly defined, the plan currently endorses the development of two proposals: a minor in public health and a major in film studies.

Implementation

- Finish planning for a public health minor to meet increasing student and faculty interest in this field, and to provide students with the foundation to enter a graduate program in public health; refer to the *ad hoc* Public Health Planning Committee and the Curriculum Committee for review.
- Explore a film studies major, building on student and faculty interest and the College's existing strengths in communication, literary studies, theatre, and other related fields; create an *ad hoc* film studies planning committee to develop a proposal for submission to the Curriculum Committee.

**B. Academic Services**

***Primary Objectives:*** *Further distinguish Muhlenberg as a caring intellectual community that supports students with different learning styles and strengths and provides excellent support in students' realization of their postgraduate ambitions. (Supports Strategic Goals 3 and 4).*

5. ***Establish an articulation agreement with Thomas Jefferson University College of Health Professions.***

Building on our successful current Articulation Agreements with Drexel College of Medicine (4-4), University of Pennsylvania School of Dental Medicine (3-4), and SUNY College of Optometry (3-4), Muhlenberg will seek to execute with Thomas Jefferson University an Articulation Agreement for pre-professional students to earn a BS degree from Muhlenberg and continue on at Thomas Jefferson for an MS in Occupational Therapy or a DPT in Physical Therapy, allowing students to complete graduate work in a shortened time frame.

Implementation

- Discussions with TJU were initiated during spring 2004.

6. ***Create an Academic Resource Center.***

Building on the College's strengths and reputation in academic support services, we will combine related services in a central operation designed to strengthen the academic program, further develop individual potential, and attract and serve gifted college-bound students from diverse backgrounds. In addition to the current Academic Support Services, the Center will include: Disability Services, and a Testing Center. It is possible that the Writing Center will occupy this space as well.

Implementation

- Expand space within Seegers Union to accommodate combined service operations including increased space for testing accommodations (*See 12. below*).
- In consultation with the Writing Program Committee, determine whether the Writing Center should be relocated to the Academic Resource Center.
- Increase operational budgets to provide clerical and student help as well as additional operational expense.
- Provide resources, including new endowment, to institutionalize many of the disability services created by the federal appropriation during 1998-2003.

7. ***Establish a Center for Career and Pre-Professional Advising.***

The current Office of Career Development and Placement will continue to serve as a source for information about choice of major and career but will also provide additional related services important to students' future success, including advising for pre-health and pre-law, administrative work associated with Postgraduate Awards Initiatives, facilities for self-assessment and for students to identify a variety of opportunities for experiential learning, and an attractive site for connections with alumni and prospective employers.

Implementation

- Expand space within Seegers Union to accommodate the new Center.
- Increase operational budget to provide additional part-time staff support.

### **C. Co-Curricular and Extra-Curricular Life**

***Primary Objectives:*** *Make the student experience at Muhlenberg notable for the quality, variety, and educational value of its co-curricular and extra-curricular experiences, providing students with opportunities to integrate intellectual, spiritual, physical, civic, and social life in creative and powerful ways. (Supports Strategic Goals 2,3, and 5).*

#### **8. *Expand System of Living-Learning Communities.***

Muhlenberg enjoys a competitive advantage in the variety of its residential options for students, ranging from traditional residence halls (including one single-sex residence for women), to clustered residential suites, to fraternity and sorority houses, to semi-independent living (MacGregor Village), to independent living (apartments and M.I.L.E. properties). This variety can be further developed to create living-learning communities that forge stronger links between the residential experience and the intellectual life of the campus.

##### **Implementation**

- Develop living-learning settings where students complete coursework within a residential facility, beginning with a prototype experience in Hillcrest House during the 2004-2005 academic year (students in Hillcrest House will enroll in one shared course, taught in the House, each semester).
- Expand group interest housing within the M.I.L.E. properties, where students with designated interests live together and work on common initiatives that can benefit the community.
- Enhance the sense of community within residence halls by providing more and better educational and social programming.

#### **9. *Create New and Improved Student Housing.***

Muhlenberg should provide housing that anticipates the changing needs of our students, complements our educational programs, and fosters living-learning communities, while emphasizing variety, quality, and proximity. We must continue to improve the physical condition of designated residence halls with the goal of making them competitive with housing at benchmark institutions, through regularly budgeted maintenance and renovation. We must replace the decaying “temporary housing” in MacGregor Village with attractive, functional, and durable student housing, increasing the number of beds to diminish our dependence on the more distant (and leased) Tremont Apartments.

##### **Implementation**

- Invest approximately \$3,500,000 in new housing on or near the site of the current MacGregor Village, with a minimum of 60 beds.

**10. *Strengthen the Relationship between Athletics and the College's Academic and Enrollment Objectives.***

Athletics within a liberal arts setting can provide a powerful educational experience as well as assist the College in achieving its enrollment and gender balance goals.

Muhlenberg's athletic program is currently a source of pride, but we must ensure that it remains a safe, competitive, and well-managed activity that consistently meets NCAA and Title IX standards, that student-athletes are representative of the College's academic standards and participate fully in the life of the campus, and that Muhlenberg teams remain formidable competitors within the Centennial Conference.

Implementation

- Complete fund raising for the new 40,000 s.f. / \$12,500,000 addition to the Life Sports Center. Develop program initiatives that make the expanded LSC inviting for all students and a focal point for campus life and energy.
- In consultation with the College Committee on Fitness and Athletics, continue to expand and improve efforts to recruit Scholar-Athletes.
- In consultation with the College Committee on Fitness and Athletics, develop and implement a plan for staffing and programming that promotes greater diversity and gender equity among students who participate in athletics.
- Add a full-time head coach in field hockey to create more equitable coaching loads (effective Summer, 2004).
- Develop "Coaches as Educators" initiatives to engage coaches more productively in scholar-athletes' academic experience.

**11. *Revitalize the Greek System's Role in Leadership and Character Development.***

This initiative acknowledges that Greek life can have value within the context of the mission of the College by providing living communities that foster growth and learning. While past campus relationships have been framed primarily by the contributions of Greek life to the social life of students, this initiative calls on Greek chapters to re-examine their standards in scholarship, leadership, service, socialization, and character. The goal of this initiative is to create a shared vision among College constituencies as to the future for Greek life.

Implementation

- Act on information and advice to be submitted in Fall, 2004, by the President's Ad Hoc Planning Task Force on Greek Life (including faculty, student, staff, and alumni representatives).
- In consultation with the College Committee on Student Life, formulate a relationship statement and processes outlining expectations of all who interact with Greek organizations: students, College administration, alumni, and national fraternity and sorority offices.

**12. *Enhance and Augment Facilities for Co-Curricular and Extra-Curricular Life through the Expansion and Renovation of Seegers Union.***

Designed approximately 40 years ago for a significantly smaller campus population, Seegers Union is currently a popular and successful, but severely overtaxed and overcrowded facility. Substantial, phased expansion and renovation will be required if Seegers is to continue playing a vital role in campus co-curricular and extra-curricular life and academic support services (see above VII.B.2, 3).

Implementation

- Beginning in 2005, invest approximately \$3,500,000 in an addition to and renovation of Seegers Union that will provide expanded office, instructional, and meeting space for the Center for Academic Services, the Career and Pre-Professional Advising Center, Student Activities, Greek Leadership Development, and Community Service functions, as well as flexible space that can provide additional dining and meeting venues.
- Redesign and renovate the Red Door to provide improved student social space.
- Acquire scheduling software to more efficiently manage campus event scheduling.
- Investigate the feasibility of creating a convenience store within Seegers Union.
- Beginning in 2009, invest approximately \$11,500,000 in a second addition and renovation program that will remedy undersized dining area and outdated food preparation, food storage, and food servery facilities.

**13. *Enhance Support for Religious Life and for Student Leadership Development.***

Expand support for student leadership and other service activities that emphasize values, personal growth, skills development and experiential learning as described in the Fundamental Institutional Values statement (see Attachment 1). Strengthen the program infrastructure for Religious Life activities.

Implementation

- Develop programs that emphasize student leadership development through an internal grant program that involves both student life and religious life. Double available space for Newman Center activities (Summer, 2004).
- Stabilize Hillel Director's status by making her an employee of the College; recruit additional Hillel programming staff as permitted by fund raising results and support from Hillel International upgrade Hillel to Foundation status. (Summer, 2004).
- Secure endowment for Chaplain's office programming and religious life activities as opportunities arise.

**14. *Refocus and Expand Student Social Life through Integration of Curricular, Co-Curricular, and Extra-Curricular Activities While Expanding Off-Campus Opportunities and Use of Off-Campus Venues.***

Implementation

- Create a higher level of student satisfaction through better coordination of existing events and addition of social and other events.
- Continue efforts to include students in planning; encourage use of students as performers, technicians, and organizers of events.
- Assist students in developing more varied social opportunities in the broader community beyond the campus, through the LVAIC consortium, development of the 19<sup>th</sup> Street area, and other partnerships.
- Increase integration of multicultural programming opportunities and take greater advantage of the opportunity to celebrate diversity on and beyond the campus.

**D. Finances, Facilities, Technology**

***Primary Objectives:*** *Ensure that Muhlenberg has the financial capacity, technological infrastructure, and facilities to achieve all its strategic objectives while assuring the availability of adequate resources for our successors; maintain the campus as a beautiful and efficient venue for the pursuit of our mission. (Supports Strategic Goals 1- 6).*

**15. *Augment Classroom Technology to Strengthen and Enhance Pedagogy.***

Implementation

Utilizing regularly budgeted funds for capital improvements and existing staffing:

- Add TechWall technology, as needs are determined, to the remaining general-use classrooms and in other appropriate teaching spaces.
- Achieve real-time response in classroom technologies support by acquiring remote management tools, Help Desk staff dedicated to this function, and classroom telephones.
- Expand training offerings that will help faculty to convert teaching material and use new materials in TechWall settings.
- Continue to expand functionality at the TechWall podium based on priorities identified by the College Committee on Information Technologies.
- Provide mediated videoconferencing abilities in spaces such as Miller Forum and Lithgow Auditorium.

**16. *Strengthen the Security and Reliability of the Campus Network.***

The campus network is now a fundamental tool for research, teaching, and management. Its security, adequacy, and reliability are essential to Muhlenberg's continued progress in virtually every area of endeavor. Additional technical staff will permit implementations of the following actions:

Implementation

- Consolidate over 35 fiber segments on new and improved panels that will improve reliability, simplify troubleshooting, and improve integrity of operational aspects.
- Consider additional wireless service in public zones on campus to support collaborative computing using laptops, PDAs, and other portable devices.
- Acquire and install software to provide Email users with further protection from Spam and virus-spawned or virus-laden messages and to avoid related disruptions.
- Recommend to the College Committee on Information Technologies further investigation of more effective electronic communication on campus.
- Acquire and install software to enforce proper log-ins and perform vulnerability scans against each student PC prior to granting campus computer network service, thereby reducing problems related to viruses, worms, and other threats.
- Expand emergency power capabilities to safeguard electronic communication capability during emergency situations. (Protection already exists for voice communication.)

**17. *Create a Long-Range Capital Plan.***

Muhlenberg needs to establish systematic financial planning to assure funding of ongoing facilities and major equipment needs (capital renewal) and to address emerging goals and priorities of this and subsequent strategic plans. A Capital Plan, periodically updated, will: insure a comprehensive view of all needs with appropriate prioritization before any commitment is made to a proposed project; allow for orderly planning relative to fundraising; and allow for distribution and timely consideration of deferred maintenance, thereby avoiding disruption of building use and services.

Implementation

- Beginning in FY'06 we will annually budget increased funds for special projects to address ongoing building repairs and other ongoing maintenance short of major renovations and construction.
- Beginning in FY'05, funding plans will be developed in advance for major construction projects that are strategic priorities (including new buildings and major renovations), utilizing fundraising, bond issue proceeds, reserve funds, and excess revenues.

**18. *Create an Improved Green Campus Core.***

Muhlenberg's attractive campus is a strategic strength, important both for recruiting and for the quality of life of all faculty, staff, students, and alumni. This initiative will create a more open and aesthetically pleasing inner campus in the areas between the playing fields and Trumbower and the area between the Life Sports Center and Ettinger Hall.

Implementation

- Beginning with the completion of the Life Sports Center addition and science renovations, invest up to \$1,000,000 to complete design and landscaping to produce two new attractive campus quadrangles characterized by green space, walkways, and outdoor gathering, program, and recreational space.
- Except for limited access by service vehicles, relocate all interior parking to lots at the edges of campus.
- Beginning in 2009, invest approximately \$3,500,000 to relocate maintenance sheds, plant operations functions, and parking to the periphery of the campus, renovating the current plant operations offices for academic, administrative, or student life purposes.

**19. *Preserve the Campus Tree Legacy.***

We will initiate an ongoing campus tree replacement and maintenance program in order to preserve this valuable asset for current and future generations and retain the natural beauty of the campus. Many of the older Norway Maples lining the streets bordering campus were planted about the same time - likely in the 1940's. They are in poor condition and are increasingly susceptible to disease as well as insect and storm damage and will need to be replaced before long. Although many of the inner campus trees are thriving, others are in need of attention. Trees mature slowly; consequently, replacement efforts must begin immediately.

Implementation

- With the help of faculty and others, create an ongoing plan for annual tree acquisition and replacements, targeting specific locations on campus and species to be acquired.
- Using a recently completed tree survey, create an annual tree maintenance program to protect the campus tree inventory.
- In a planned tree replacement program, invite faculty and students to consider opportunities for labeling of trees, studying tree maturation processes, observing tree cultivation and management practices, and studying the impact of species diversification.
- Consider fund raising opportunities to support this effort.

**20. *Develop a “Muhlenberg Village” Through Selective Real Estate Acquisition and Incentives for Faculty Property Acquisition.***

By increasing the number of faculty and staff living in the neighborhood adjacent to the campus, the College can increase faculty and staff participation in campus life, reduce the need for faculty and staff parking, stabilize the neighborhood by attracting more families, and create more of a “walking campus.”

Implementation

- As current budgets permit, acquire strategic properties at fair market value for current and future needs of the College, giving highest priority to acquisition of privately-owned properties within the Institutional and Government Zoning District.
- Beginning in 2009, create incentives for faculty and staff to purchase or rent property near the College.

**E. Admissions and Financial Aid**

*Primary Objectives: Increase Muhlenberg’s academic selectivity and cultural diversity through effective marketing and strategic utilization of financial aid resources (Supports Strategic Goals 3,5, and 6).*

Muhlenberg’s admissions and financial aid office will, by 2009, seek to increase the number of applications from 4,100 to 4,500; increase the average SAT scores of matriculating students from 1212 (Class of 2007) to 1250; maintain an acceptance rate under 50%; and increase multicultural enrollments from 7.9% to at least 10%.

**21. *Improve Market Research and Refine Marketing Messages and Materials.***

The College’s current marketing messages are the result of past initiatives, feedback from faculty, current and prospective students; and analysis of the Admitted Student Questionnaire. This initiative would test the current messages against the actions and goals resulting from the new Strategic Plan to insure that they capture the important essences of the current and future Muhlenberg experience and that they work in the marketplace.

Implementation

- Utilizing in-house capabilities, including market research classes, develop and test updated marketing messages that reflect the College’s traditional values and emerging priorities.
- Make better use of current and planned program assessment tools to promote Muhlenberg’s strengths and achievements.

**22. *Continue to Improve Campus Visits and Personal Relationships as Cornerstones of the Admissions Recruiting Program.***

Implementation

- Create additional ways of intensifying the sense of relationship with prospective students.
- Further strengthen the Tour Guide and Campus Hosts program.
- Target top recruits with additional personal attention.

**23. *Make SAT-Optional Admissions Policy Permanent.***

This policy, passed on an experimental basis by the faculty and Trustees in 1996, has had a positive impact in building the College's application and Early Decision pool as well as attracting multi-cultural students. The policy has gained the College positive press and positive feedback among high school guidance counselors and has not been harmful to the College in terms of academic quality of enrolled students.

Implementation

- Present this proposal to the Academic Policy Committee, the faculty, and the Trustees for review.

**24. *Expand Program-Specific Student Recruitment.***

To deliver the best class of appropriate size, quality, energy, and diversity at a cost the College can afford, we will create a Faculty Fellow Program where one faculty member in one department or division per semester (or year) will, in consultation with the Admissions Office, develop and implement a recruiting plan using such techniques as: developing department-specific recruitment messages; evaluating and improving the department's web site; personalizing the department's recruitment efforts; and developing a department-specific recruitment plan and timetable.

Implementation

- The College will budget incremental funds to facilitate one or more such departmental or divisional initiatives each year.

**25. *Increase enrollment of multicultural students to at least 10% of the student body by 2009.***

Implementation

- Beginning in FY'07, increase the financial aid budget each year to accommodate a 75% increase in Prep-for-Prep enrollments, increasing from four students per class to seven students per class by year four.
- Work closely with faculty, staff and students to develop strategies for recruitment of multicultural students from the Lehigh Valley and beyond.

## **F. Development and Alumni Relations – Deepen Alumni Loyalty and Engagement**

***Primary Objectives:*** *Develop the financial resources necessary to implement the strategic plan and to build a robust philanthropic culture among Muhlenberg’s alumni and other stakeholders by building relationships, communicating institutional priorities, and securing charitable gifts and grants (Supports Strategic Goals 1- 6).*

### ***26. Increase Private Support from Individuals.***

Initial screening of the College’s constituency base indicates that there are 2,816 unknown or unassigned major gift prospects with the potential capacity to commit a minimum of \$25,000 over a five-year period. To meet the financial requirements of the plan, Muhlenberg must accelerate its fund raising outreach to prospective donors.

#### **Implementation**

- Beginning in FY’04 four new positions were authorized for development; one of these positions will carry direct responsibility for soliciting gifts, the other three will provide backroom support currently handled by contact officers, thus freeing these staff to spend more time on cultivation and solicitation of prospective donors.

### ***27. Strengthen and Expand the Volunteer Network.***

#### **Implementation**

- The Vice President for Development and Alumni Relations will work with the staff to identify meaningful opportunities to strengthen and expand the volunteer network, especially in fundraising roles, and to develop a plan for recruiting, training and effectively supporting volunteers.

### ***28. Create an Alumni Center on Campus.***

To nurture alumni loyalty and engagement with the College, and to provide additional administrative office space for Alumni Relations staff, the College will create an Alumni Center on campus, providing a base for alumni visitors.

#### **Implementation**

- The College will seek zoning variances to permit conversion of a currently owned house adjacent to the campus to an Alumni Center.
- The College will secure funds to cover the cost of conversion and to endow operating costs.

## **G. Muhlenberg and the Community**

29. *Develop and nurture mutually beneficial partnerships with other cultural and educational institutions, with local government, with other local organizations, and with neighboring businesses and individuals to improve the quality of life for our students, faculty, and staff and the broader community (Supports Strategic Goals 2,3, and 5).*

### **Implementation**

- Collaborate with the LVAIC Consortium to provide wider student social options, realize cost savings, and explore other opportunities.
- Participate in economic development efforts, specifically in the 19<sup>th</sup> Street area neighboring the campus and particularly targeting the development of retail and entertainment enterprises that will be appealing to students.
- Seek out and develop collaborative agreements with local institutions such as the agreement with Allentown Museum of Art reached in May, 2004, Wescoe School Community Scholarships, collaboration with the Allentown Police Department, and participation in the Bio-Terrorism Task Force.
- Maintain regular and positive communications with the College's immediate neighbors, providing relevant information about the College's plans, activities and programs open to the public.
- Produce a publication "Muhlenberg and Its Neighbors," which will communicate to our neighbors the College's multiple and substantial contributions to the Lehigh Valley.
- Continue to support and expand the College's substantial outreach program of student volunteer service in the community.

## **IX. The Financial Plan**

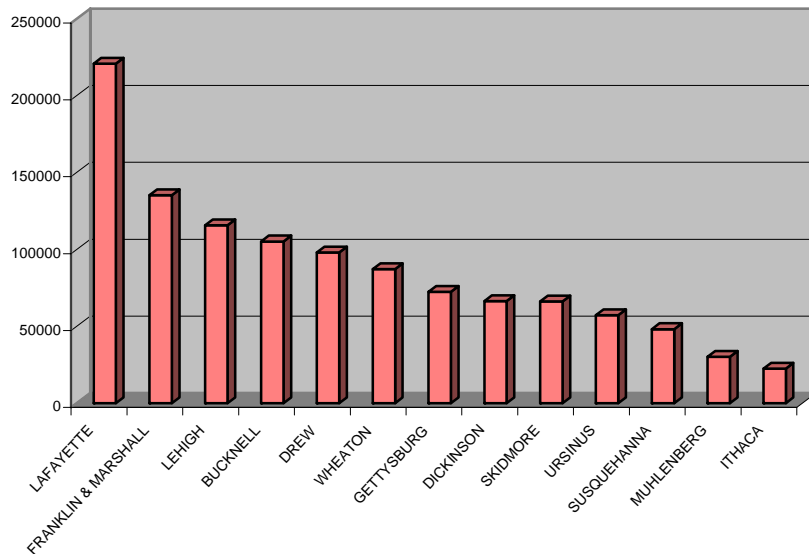
### **A. The Budget Model**

From the beginning of the planning process, the Trustees, President, President's Staff, and PPG agreed that strategic initiatives must be achievable within the footprint of a balanced budget, defined as including service on a prudent level of debt. We will not undertake strategic initiatives without knowing how we are going to pay for them.

To assure the College community that strategic initiatives are affordable and sustainable, we have developed a ten-year budget model that incorporates various assumptions, including estimated cost increases (compensation, health benefits, financial aid, operating budgets, etc.) and projected revenue increases (student charges, Wescoe School net income, endowment income, charitable giving, etc.).

Compared to its benchmark institutions, Muhlenberg is underendowed, and thus has less investment income to spend on each student's educational experience than do most of our competitors.

Endowment per Student as of 6/30/03 (000)



The financial plan will therefore need to emphasize endowment growth, though it will take several years before the endowment increases sufficiently to produce a significant effect on the budget. Consequently, a balanced budget will continue to be heavily dependent on student charges (closely linked to the achievement of enrollment targets) and on successful and aggressive fund raising. Urgent capital projects can be funded most expeditiously by undertaking an appropriate level of debt.

### **B. Enrollment Targets**

Early in the process we weighed the advantages and disadvantages of decreasing, increasing, or maintaining the current enrollment level of approximately 2100 students.

The only motive for decreased enrollments (which would carry a significant financial penalty in lost tuition and fee revenue) was considered to be increased quality, defined as higher admissions selectivity and a more advantageous student-faculty ratio. Upon analysis by the Dean of Admissions and the Provost, it appeared that such gains were trivial, while the financial penalty would be crippling.

The additional revenues to be gained by increasing enrollment levels were momentarily tempting, but upon further analysis more than offset by the substantial costs of maintaining current levels of quality: adding faculty lines to maintain the current student-faculty ratio, adding student services staff, and constructing additional classroom, office, dining, and residence hall capacity. Furthermore, increasing enrollment targets would result in decreased admissions selectivity and, arguably, diminished academic quality. Finally, increased enrollment levels would create crowding and strain personnel and facilities in ways that could damage Muhlenberg's unique culture. It would also put unwelcome pressure on the neighborhood, including but not limited to parking.

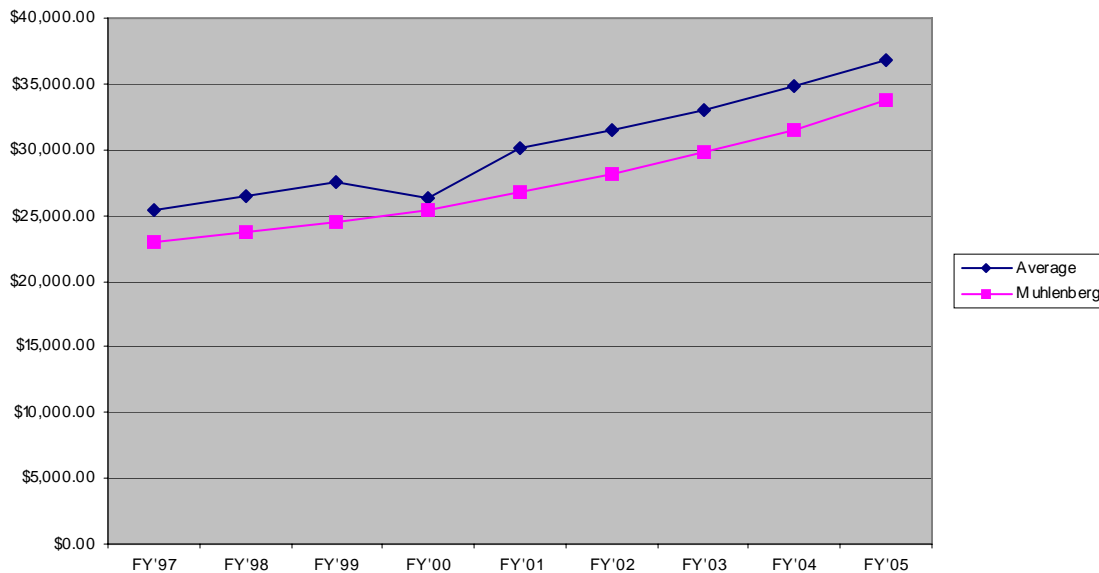
Consequently, the plan calls for maintaining current enrollment levels, while making strategic investments that increase quality and add value to the Muhlenberg experience.

Stabilizing enrollment is a significant decision. Although, during the past twelve years, increasing enrollments funded considerable faculty and staff growth and much new construction, this strategy will no longer work as a means of generating substantial incremental resources. It is therefore a foundational principle of this plan that we build a more sustainable model for the College's finances going forward.

### C. Student Charges

Muhlenberg's remarkable admissions success over the past decade can be attributed to a combination of factors, including the marketing expertise and commitment of the staff, the quality of the College's programs, and, not insignificantly, our pricing policy. Muhlenberg has consistently remained a "value leader" among our benchmark institutions, with total student charges averaging approximately 10% below the total student charges of our benchmark institutions.

**Student Charges: Muhlenberg v. Benchmark Group Average**



Muhlenberg must strive to remain a value leader during the next decade, though perhaps not by so wide a margin. Accordingly, the budget model for the plan anticipates continued increases in student charges at or slightly above the percentage increases of our benchmark institutions. This will allow reasonable annual increases in the operating budget (including the salary pool) to sustain the quality of existing programs.

The combination of comparatively low endowment and comparatively low student charges in relation to our benchmark group of competitors means that Muhlenberg must be extremely strategic in its investments and highly efficient in its operations. The review of Muhlenberg

operations early in the planning process confirmed that the College operates at a very high level of efficiency, competing successfully with fewer faculty, staff, and resources in a number of areas.

**D. Debt**

Muhlenberg has the capacity to borrow up to approximately \$25 million at current rates without jeopardizing its current bond rating. The plan calls for a bond issue in this amount in the first year of the plan, with the possibility of a second bond issue for \$15 million during the second five years of the planning period. Estimated debt service for these bonds is built into the plan’s budget model. Bond proceeds must be spent within two years of the bond issue, and must be spent on capital projects specified in the bond. We anticipate funding most or all of the plan’s capital projects (science facilities, art and music facilities, student union renovation and expansion, residence halls, etc.) through bond issues.

<b>Capital Projects</b>	<b>Funding Needed</b>
Science Facilities	\$15,000,000
Art and Music	1,000,000
Student Residence Facility	3,500,000
Seegers Union Expansion	3,500,000
Campus Core	1,000,000
Contingency	<u>1,000,000</u>
	\$25,000,000

**E. Fund Raising**

The College has recently enjoyed record levels of support from its stakeholders, but Muhlenberg has considerable untapped fundraising potential. The success of this plan will require us to be even more successful in securing philanthropic support than in the recent past. Until recently, Muhlenberg has under invested in its development program. At the outset of FY’04 the Trustees approved a substantial increase in development staffing (four new positions) and in prospect research services aimed at increasing our fund raising productivity. The strategic plan calls for more than \$4.7 million in capital gifts to be secured for the completion of the Life Sports Center addition within the next twelve months, for aggressive increases in unrestricted annual giving (\$10.5 million over the next 5 years), and for a strong focus on endowment fund raising during the same five-year period (\$16.9 million for endowed faculty chairs, scholarships, research funds, library funds, unrestricted, and other types of endowment) to address the College’s chronic strategic disadvantage in this regard. Thus, fund raising will support most of the non-capital costs of the strategic plan, through a combination of unrestricted expendable and endowment gifts. The plan currently envisions such costs as including additional faculty lines, augmented financial aid for multicultural students, increased resources for faculty and student research, enhanced support for student services, and the significant operating costs associated with new facilities.

The College is already engaged in a capital campaign (“Pride and Progress”) with approximately \$53 million raised toward a \$70 million goal (as of 6/30/04). The fund raising efforts demanded by the plan will probably require us to reconfigure the Campaign, extending the deadline by several years, while increasing the goal to *at least* \$85 million.

## **F. Modifications to the Plan**

In 42 B.C. Publius Syrus wrote: “It is a bad plan that admits of no modifications.”<sup>3</sup> While we have built the financial model on reasonable – perhaps even conservative – assumptions, we realize that these assumptions must be continually tested against the reality of unfolding events. Changes in actual endowment performance, enrollment results, interest rates, health benefits costs, fund raising results, or other variables may require course adjustments in the plan going forward. Furthermore, we must acknowledge that the second five years of the ten-year budget model are much less reliable than the first five years, simply because the future grows less predictable the further out we scan the horizon.

We have therefore built flexibility into the plan by calling for new initiatives to be introduced over time and in an order that maximizes opportunities for periodic review. Obviously some elements of the plan are more easily adjusted than others. A building, once begun, must be completed and its operating costs (utilities, cleaning, maintenance) must be budgeted. New faculty and staff positions, significant increases in financial aid, and/or augmented budgets for various types of programming can be reduced or delayed if necessary. We must be realistic that the strategic plan is a guide post, not a hitching post: it sets compass points to steer our continuing efforts in the face of an uncertain future.

## **X. Conclusion**

Muhlenberg’s stakeholders have every right to face the future with confidence and pride, as long as those emotions are linked to determination and committed generosity. Each earlier generation has left the College better and stronger. Now it is our responsibility to move Muhlenberg to the next level of excellence. Forged in broad-based discussion and debate and rooted in thoughtful analysis, this plan represents a shared vision of our future. The plan honors and builds upon our traditional strengths and values, and promises to make Muhlenberg a nationally recognized locus of excellence in liberal arts education, known especially for its distinctive emphasis on linking theory and practice while training graduates for lives of leadership and service. It requires purposeful choices and will demand substantial support from all members of the Muhlenberg family if we are to meet our obligation to the future.

---

<sup>3</sup> *Maxims* 429

# **Attachment 1**

## **Fundamental Institutional Values<sup>1</sup>**

(rev. 1/20/04)

A Muhlenberg education develops each individual's capacity for a life of leadership and service by challenging and strengthening mind, spirit, character, and community. We believe the College's faculty, students, staff, Trustees, and alumni share and contribute to the following values. Accordingly, these values should guide and inform those engaged in the College's strategic planning process as we identify goals, develop strategic initiatives, and set priorities.

### **I. Commitment to the Life of the Mind**

- We believe that liberal education integrates experiences both within and beyond the classroom, and provides students with the passion and tools for self-initiated and self-directed life-long learning.
- Muhlenberg demonstrates an unusually strong dedication to teaching. This is reflected in the faculty's rigorous intellectual standards, pedagogical expertise, and close relationships with students, and in the balance of academic challenge and personal support that we offer our students.
- We value vigorous and open-minded debate within the context of civility.
- We insist upon intellectual integrity and personal accountability.
- We value critical independent thinking and reject intellectual orthodoxy.
- We believe in the fundamental importance of research and the creation of new knowledge for the intellectual vitality of both faculty and students.
- We believe that the life of the mind embraces both analytical and creative effort.
- We believe that liberal education should nurture both the capacity for independence and the ability to work collaboratively with others.

### **II. Commitment to Spirit and Character**

- We acknowledge the value and power of spiritual life, as well as our individual limitations in achieving absolute understanding of truth. Accordingly, we respect and show active interest in and concern for both our own and other faith traditions.
- We believe that honesty, integrity, and truthfulness should characterize both our public and private behavior, and that the development of ethical standards is an important component of liberal education.
- We value the physical well being of ourselves and others, as well as the important life lessons that can be learned from healthful physical activity.
- We are committed to self-improvement and strive openly and actively for ever higher standards of excellence in all areas of endeavor.

---

<sup>1</sup> This document derives from "A Covenant of Values, Principles and Behaviors for a College of Character" developed by the Campus Climate Committee of the Muhlenberg College Board of Trustees (April, 2003), and subsequent suggestions from the President's Staff and the President's Planning Group (October - November 2003)

- We realize that pushing ourselves to stretch our personal limits of knowledge and understanding will sometimes result in failure and that failure provides opportunities for personal growth.

### **III. Commitment to the Life of the Community – On Campus and Beyond**

- We treasure a distinctive campus climate characterized by warmth, friendliness, a strong sense of community, and close relationships among students, faculty, and staff.
- We demonstrate mutual respect for differing ideas, perspectives, experiences, and personal identities.
- We strive to function as a caring community, demonstrating concern for and offering support to each other, while challenging each other to excel.
- We reject as unacceptable behavior characterized by violence, malice, disrespect, indecency, or contempt for others.
- We are committed to developing a campus culture in which fairness, equality, human diversity, and justice are successfully integrated with the healthy clash of ideas and beliefs.
- We acknowledge our obligation to be good neighbors and good citizens, and to improve the lives of those inside and outside our community who have less access to education and political power, fewer privileges and resources, and who bear the burden of discrimination.

## **Attachment 2**

### **Participants in the Planning Process**

#### **I. President's Staff**

Dr. Peyton R. Helm, President  
Rev. Peter Bredlau, College Chaplain  
Dr. James Brennan, Dean of the Wescoe School  
Mr. Michael Bruckner, Vice President for Public Relations  
Mr. Ken Butler, Executive Assistant to the President  
Mr. Kent Dyer, Chief Business Officer & Treasurer  
Dr. Rudy Ehrenberg, Dean of Students  
Dr. Marjorie Hass, Provost  
Dr. George Heitman, Dean of International Programs  
Ms. Anne Hochella, Vice President for Human Resources  
Mr. Christopher Hooker-Haring, Dean of Admission & Financial Aid  
Mr. Tilghman Moyer, Vice President for Development & Alumni Relations  
Dr. Carol Shiner Wilson, Dean of the College for Academic Life

#### **II. President's Planning Group**

##### **Administration**

Chair: Dr. Peyton R. Helm, President, Muhlenberg College  
Vice Chair: Mr. James Steffy, Planning Consultant  
Mr. Michael Bruckner, Vice President for Public Relations  
Mr. Kent Dyer, Chief Business Officer & Treasurer  
Dr. Rudy Ehrenberg, Dean of Students  
Mr. Christopher Hooker-Haring, Dean of Admission & Financial Aid  
Mr. Tilghman Moyer, Vice President for Development & Alumni Relations  
Dr. Marjorie Hass, Provost

##### **Students**

(one student from each class, selected by a joint committee of students, faculty and staff)

Mr. Steve DeMeo '04  
Ms. Teresa Adams '05  
Mr. Andrew Kalish '06  
Ms. Molly Miller '07 (through December, 2003)  
Ms. Katie Kirchner '07 (from January, 2004)

##### **Faculty**

(6 faculty representing the three academic divisions of the College, elected by the faculty.)

Dr. Bruce Anderson, Chemistry  
Dr. Don Dale, Accounting, Business, Economics  
Ms. Karen Dearborn, Theatre & Dance  
Dr. Jane Flood, Physics  
Dr. Giacomo Gambino, Political Science  
Dr. Lawrence Hass, Philosophy

**Staff Associate**

Ms. Justine Frantz, Accounting/Business/Economics

**Management Staff**

Ms. Lauren Shanahan, Development & Alumni Relations

**Service Personnel**

Mr. Joseph Spirko, Plant Operations

**III. Board of Trustees**

Mr. Alexander M. Adelson '56  
The Rev. Roy G. Almquist, Bishop '62  
Dr. Arthur A. Altman '53, P'84  
Mr. Harvey Benenson, P'04  
Ms. Tammy L. Bormann '83  
Dr. Paul C. Brucker, '53  
Mr. Richard Brueckner '71, P'04  
Mr. Greg L. Butz  
Mr. Edward Davis '60  
Lona M. Farr, Ph.D. '62, P'94  
Mr. Greg Fox '76  
Ms. Marion Glick '82  
Mr. John M. Heffer, P '96 Board Chair  
Dr. Peyton R. Helm, President  
Mr. David B. Hilder  
Mr. Bruce G. Kilroy '71  
Rev. Wilma Kucharek  
Mr. Theodore T. Lithgow, Jr. '53, P'76  
Mr. Paul Marin '99  
Ms. Melanie Mason '83  
Mr. John W. McConomy '71, P'99  
Mr. Thomas W. Mendham '63, P'91  
Mr. William Miers '49  
Mr. Mark J. Paris '80  
Ms. Susan Pobjoy '73  
The Rev. Dr. John H. Reumann '47  
Mr. Richard Romeo '79  
Dr. John B. Rosenberg '63  
Mr. Joseph B. Scheller  
Mr. Paul Silverman '78  
Mr. James A. Skidmore, Jr. '54  
The Reverend David R. Strobel  
Mr. Paul Vikner '72  
Mr. Robert C. Wood

**Life Trustees**

The Rev. Dr. John Adam '55  
Mrs. Dorothy H. Baker  
Mr. Alfred O. Breinig '35, P'62  
Mr. John A. Deitrich '35  
Mr. H. Warren Dimmig '42  
Mr. Lawrence A. Greene, Jr.  
Earl S. Heffner, Jr., Esquire '53  
Mr. Donald Hoffman '32, P'61, P'64, P'67  
Mr. Wayne R. Keck '44, P'67  
Mr. Robert Klein  
The Rev. Dr. Robert J. Marshall  
Mr. Edward H. Robertson '42  
Donald T. Shire, Esq., P'90  
The Rev. Dr. Harold Weiss '52  
Mr. Walter Weller, Jr. '44

**Associate Trustees**

Ms. Cynthia Boehlke '84  
Adam Brodsky, Esq. '95  
Mr. Stuart Freiman '75, P'08  
Attorney N. Dante LaRocca '78  
Mr. J. Douglas Newsome '82  
Mr. Jeffrey Porphy '89  
Mr. Ken Rogers '85  
Mr. David Silber '98  
Mr. Robert Snider '80  
Ms. Joan Triano '81

#### **IV. Meetings and Forums**

<b>DATE</b>	<b>LOCATION</b>	<b>ATTENDANCE</b>
09/16/03	CKS Speaker Series featuring President Helm	35
09/18/03	New York, NY – Meet the President	155
09/24/03	Washington, DC – Meet the President	72
09/30/03	Philadelphia, PA – Meet the President	140
10/10/03	Henry Melchior Muhlenberg Society, Homecoming	190
10/11/03	Homecoming – Meet the President	40
10/11/03	Parents Council Discussion	30
10/30/03	Boston, MA – Meet the President	56
11/03/03	Portland, ME – Meet the President	35
11/17/03	Heritage Luncheon – Meet the President	35
11/22/03	Alumni Association Executive Council Meeting	30
01/09/04	Loews Hotel, Philadelphia – Strategic Planning Forum	254
01/13/04	San Francisco, CA – Meet the President	20
01/14/04	Los Angeles, CA – Meet the President	19
02/02/04	Campus Forum	174
03/10/04	Tampa, FL – Meet the President	20
03/11/04	South Florida – Meet the President	25
03/18/04	Northern New Jersey – Meet the President	82
03/25/04	Northern/Central New Jersey – Meet the President	68
05/05/04	Chicago, IL – Meet the President	23
05/13/04	Denver, CO – Meet the President	13
06/05/04	Reunion Weekend – State of the College Address	83