

**Doane University Strategic Planning Framework
May 2022 through June 30, 2023**

Purpose	WE BUILD LEADERS					
Mission	Doane University creates distinctive educational experiences, rooted in the liberal arts, to prepare our students for careers and lives grounded in inquiry, ethics, and a commitment to lead and serve in the global community					
Strategic Pillars	<u>ACADEMIC EXPERIENCE</u> WE WILL deliver a high-quality, distinctive academic experience	<u>STUDENT EXPERIENCE</u> WE WILL deliver a high-quality, distinctive student experience	<u>ENROLLMENT</u> WE WILL increase the number of students attending Doane University	<u>CULTURE</u> WE WILL improve organizational engagement and shared governance	<u>OPERATIONS</u> WE WILL improve operational efficiencies and ensure economic viability of the university	<u>ADVANCEMENT and ALUMNI</u> WE WILL foster an engaged and supportive community of giving
Strategies	A. Enhance current academic programming through the expanded use of inclusive and innovative pedagogies B. Add additional high-quality programs that align with the mission or support current offerings C. Ensure that the academic experience, immersed in the liberal arts, prepares students for their lives _	A. Enhance and create inclusive initiatives to increase student satisfaction and success B. Expand co-curricular experiences and develop new opportunities to ensure high-impact practices are consistently delivered	A. Market to and enroll more students in order to build a diverse student body B. Design and implement a revised financial award process to improve the residential discount rate	A. Define and implement appropriate principles of shared governance B. Continue to improve engagement, inclusion, and belonging to unite, attract, develop, and retain talent	A. Improve operating margin B. Cultivate a digital first and data-informed culture C. Enhance processes to assess programs on a systematic basis	A. Enhance current fund-raising efforts to increase financial support B. Educate, engage, and empower alumni and friends to support Doane through non-financial means
A suite of <i>tactics</i> will be identified and acted upon to accomplish the strategic pillars and strategies						

Definitions
Purpose - What we do
Mission - Why we exist
Values - Approaches for achieving the mission
Strategic Pillars - What we want to achieve
Strategies - How we will achieve a Strategic Pillar
Tactics - Specific actions taken to accomplish a strategy

Updated February 10, 2023

Progress on Tactics
Not Started
Started
On Track
Behind
Complete - Success
Complete - Fail
Discontinued

ACADEMIC EXPERIENCE

WE WILL deliver a high-quality, distinctive academic experience

Strategy

A. Enhance current academic programming through the expanded use of inclusive and innovative pedagogies

Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Define Leadership at Doane. Explore current leadership opportunities in the academic curriculum to ensure students have leadership development opportunities.	Create an operating definition of the phrase "Leadership at Doane". April 2023. Analyze the current curriculum for leadership opportunities and make recommendations for enhancements. May 2023.	Judy Kawamoto and Mark Wateska	Not Started	Started	On Track	On Track	On Track	On Track	On Track	Team continues to meet. Has a draft of definition.
Define the liberal arts for Doane in order to ensure future experiences remain immersed in the liberal arts.	Create an operating definition of "liberal arts" for Doane. April 2023.	Lorie Cook-Benjamin (Lucas Kellison)	Not Started	Started	On Track	On Track	On Track	On Track	On Track	Team continues to meet. Has a draft of definition.

B. Add additional high-quality programs that align with the mission or support current offerings

Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Revise new program opportunity proposal process to ensure that ideas are reviewed in a timely and efficient manner	Revise the program proposal process to make it (1) Easier to use (2) Easier to bring ideas to discussion (3) Transparent in Approach. Work on project with pilot, new process developed by July 2022	Lorie Cook-Benjamin	Started	On Track	On Track	On Track	On Track	On Track	On Track	New program in Policy and Values launched using process in fall of 2022. Continue to use process.
Launch task-force to define certificates and identify the logistics of certificate programs	Launch task force in May of 2022. Define all logistics by July of 2022.	Lorie Cook-Benjamin	Started	Started	On Track	On Track	On Track	On Track	Complete - Success	Launched two certificates to non-degree seeking students in January 2023: Agribusiness and Software development.

C. Ensure that the academic experience, immersed in the liberal arts, prepares students for their lives

Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Develop and implement College of Business plan for Accreditation Council for Business Schools and Programs (ACBSP) accreditation.	Year 1 (2019-2020): Align curriculums and establish assessment practices Year 2 (2020-2021): Continued curriculum alignment and begin assessment Year 3 (2021-2022): ACBSP Year 1 process (membership, application, mentor) Year 4 (2022-2023): ACBSP Year 2 process (membership, write self-study) Year 5 (2023-2024): ACBSP Year 3 process (site visit, obtain accreditation)	Lorie Cook-Benjamin & John Frost (VP Enrollment)	On Track	On Track	On Track	On Track	On Track	On Track	On Track	Progress continues on ACBSP accreditation.

STUDENT EXPERIENCE										
WE WILL deliver a high-quality, distinctive student experience										
Strategy										
A. Enhance and create inclusive initiatives to increase student satisfaction and success										
Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Implement the Tiger Takeoff (Bridge Program) in order to build community around the first-year and transfer residential student to enhance their success	Summer bridge program (Tiger Takeoff) to begin establishing a comprehensive retention plan using baseline retention data from fall to spring and fall to fall, comparing program participants to nonparticipants.	Judy Kawamoto, Lorie Cook Benjamin	On Track	On Track	On Track	Complete - Success				Program had 125 active participants. Retention of participants from fall to spring was 80.8% compared to 88.7% for entire first-year residential cohort. Overall fall to spring retention of first-year residential students increased from prior two years: 83.5%, 87.2%.
Review the process for reporting mid-term grades and academic progress notifications to ensure common expectation for all undergraduate courses.	By August of 2022, the review process of how mid-term grades are reported will be completed for undergraduate residential and non-residential students. This information will be part of a comprehensive retention plan.	Judy Kawamoto, Lorie Cook Benjamin	Started	On Track	On Track	On Track	Complete - Success			The task force has examined the current process used for classes on the Crete and Lincoln campuses as well as online. Forwarded recommendations to Student Care team
Refine retention alert process through Salesforce	By the end of Fall (R), AUTM (NR) and WIN1 (NR), establish baseline data what faculty enter regarding student concerns in the Salesforce platform.	Judy Kawamoto, Lorie Cook Benjamin, Derek Bierman	Not Started	Not Started	Not Started	On Track	Behind	Behind	On Track	Retention Task Force membership determined. John and Judy developing plan for task force and scheduling first meeting for February
Implement Salesforce to enhance Navigator Team's engagement with students to drive retention, and persistence to graduation.	Phase 1: Data collection by July 2021 Phase 2: Launch to retention users (Navigator team) April 2022. Phase 3: Tracking of and categorizing the concerns for appropriate referral and follow-up during 2022-23 year.	Judy Kawamoto, Derek Bierman	Started	On Track	On Track	Behind	Behind	Behind	On Track	Retention Task Force membership determined. First meeting held January 24. Gathering historical data to determine goals. Next meeting scheduled for February 13.
Develop resources for parent and family relations for residential and nonresidential students	Monthly communication/e-newsletter/videos highlighting resources, current happenings, important dates and events beginning August 2022. Develop content for Parent & Family website by August 2022, with goal to launch in the Fall 2022 semester.	Judy Kawamoto, Derek Bierman	On Track	On Track	On Track	On Track	Behind	Behind	Discontinued	On hold due to staff departures. Will begin again pending approval of new Assistant Dean of Students position being proposed for FY 24.
Implement programs and resources to support nonresidential students	Partner with directors of the Lincoln campus and Omaha location to create and implement a minimum of four programs for our non-residential students in 2022 - 2023. Include non-residential students in 150th Anniversary celebration in July and Homecoming Survey all non-residential students in August 2022 to gauge programming interests and needs Schedule bi-monthly meetings with the leadership of the Lincoln campus and Omaha location to design programming and assess its effectiveness	Judy Kawamoto, Chris Brady, Angie Klasek	On Track	On Track	On Track	On Track	On Track	On Track	On Track	Academic Advisor/Career Specialist onboarded and working on Lincoln campus. Counselor on Lincoln campus one day each week.
Increase membership in fraternities and sororities	Increase Greek recruitment by 50%	Judy Kawamoto	On Track	On Track	Behind	Behind	Behind	Behind	Behind	On hold pending external review process.
Increase underrepresented or unleveraged first year student contact with Career, Leadership & Service	Identify and initiate contact with 75% of underrepresented or unleveraged first year students to complete an in-office, class, or programming touchpoint with CLS within the 2022 - 2023 academic year	Judy Kawamoto	Not Started	On Track	On Track	On Track	On Track	On Track	On Track	New Strategy as of January 2023- Grow engagement with first year students through exploratory career development appointments and service hours in the community

Execute the board approved initiatives to develop a cross functional team to design and build a new student residence hall and a President's House/Event Center	1) Teams work with engineers to survey users and design plans 2) Get construction documents completed for bids 3) Collect bids by August 1. 4)Develop financing plan and review with the A&B committee; Submit for board approval in August 2022. Building construction underway. Still expected to open in January of 2024 for residence hall.	Linda Scholting	On Track	Complete - Success	Complete - Success	On Track	On Track	On Track	On Track	Building of residence hall and President's House/Event center continue.
Improve gameday experience and increase revenue by installing Digital Scores table in Haddix Center	Improve gameday experience of Men's Basketball, Women's Basketball and Women's Volleyball. Increase advertising revenue by 10%. Implement by August 1, 2022. Back-ordered and waiting on delivery, expected January 2023.	Derek Bierman / Mark Wateska	Started	On Track	On Track	On Track	Behind	Behind	Complete - Success	Tables delivered and installed in January 2023.
Greek Organizations - review, continued engagement, path forward	Complete external review, work with Greek organizations to create a plan for moving forward by June 2023	Judy Kawamoto					Started	On Track	On Track	Review scheduled for on campus portion during first week of March 2023.
B. Expand co-curricular experiences and develop new opportunities to ensure high-impact practices are consistently delivered										
Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Refine faculty advising assignments for first-year residential students.	By end of Fall 2022, the Director of Academic Advising will collaborate with faculty and applicable staff on a process for the transition of first-year residential students to new faculty advisors in the students' majors and/or designated advisor for	Lorie Cook-Benjamin, Ann Koopmann	Started	On Track	On Track	On Track	On Track	On Track	Complete - Success	New system implemented across university.
Partner with Sodexo to develop plan to renovate Perry dining hall to improve student dining experience and increase efficiency	Review renovation plans and potential funding sources by August 2022.	Judy Kawamoto, Linda Scholting	Started	Started	Started	On Track	Behind	On Track	On Track	Brian Flesner researching options for paint, graphics. Ideas and feedback gathered from CA's, STUCO.
Develop plan to re-invigorate student co-curricular involvement.	Create spirit initiatives to increase attendance at athletic events (increase partnership of Student Affairs with SALT); examine student organization recognition process, resources, and support for advisors. Plans for each by August 2022.	Judy Kawamoto, Mark Wateska	On Track	On Track	On Track	On Track	Behind	On Track	On Track	STUCO changed budget cycle for FY 24, now allowing student organizations to request funds in spring semester to allow for advance planning. Working with STUCO to update budgeting process and materials.

ENROLLMENT										
WE WILL increase the number of students attending Doane University										
Strategy										
A. Market to and enroll more students in order to build a diverse student body										
Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Increase residential student applications and yield by expanding travel recruitment, community & alumni engagement, partnership with Encura	275 FY Residential Students and 35 residential transfers in Fall 2022.	John Frost	Behind	On Track	On Track	Behind	On Track	On Track	On Track	Upcoming Term-Fall 2023: Apps: 148 Admits/Accepts: 12 Deposits: 4 Fall 2022: Apps: 111 Admits/Accepts: 22 Deposits: 1 First years Future Term-Fall 2023 2023 Inquiries: 6648 Apps: 1534 Admits/Accepts: 1037 Deposits: 88 2022- Inquires: 12,827 Apps: 1619 Admits/Accepts: 1151 Deposits: 71
Increase non-residential (Lincoln and online) degree-seeking undergraduate student credit hours through expanded recruiting.	Increase FY-23 Lincoln undergraduate SCH to 2,477 (FY 22 is also 2477). To reach this number, the Admissions and Enrollment teams are aligning processes, using consistent and inclusive language, developing relationships and agreements with companies and community college; focusing on the internal pipeline of residential graduates enrolling in Doane's graduate programs; collaborating with Marketing to develop materials that speak to the Lincoln campus, Omaha location and online audiences.	John Frost & Lorie Cook-Benjamin	Started	On Track	On Track	On Track	Behind	Behind	Behind	Behind on goal of increasing by 7%. See overall metrics.
Increase enrollment in graduate programs.	15,187 graduate student credit hours in 2022-2023 Spring 2022 - Establish a COB Marketing Task Force; Spring 2022 - COE graduate programs offer an \$850 voucher to all new students beginning in summer 2022, Enrollment staff member assigned to COE graduate programs. Marketing role out for all graduate programs will begin for summer 2022 session	John Frost & Lorie Cook-Benjamin	Started	On Track	On Track	Behind	Behind	Behind	On Track	On pace for annual credits. Hired Director of Strategic Partnerships on February 1.
Upgrade, replace, and change our Client Relationship Management (CRM) system by transitioning to a cloud-based system (Salesforce) to improve tracking and use of data analytics. Allows for data informed decisions by tracking and analyzing student wants, needs and behaviors.	Using the CRM for data analysis and for interacting with students the CRM will help with: 1) Targeted marketing (email, text) 2) Automated follow up 3) Ability to import clean data (e.g. recognize duplicates, attach test scores to appropriate student record) 4) Daily analytics 5) Trackable communication tools 6) Interface with other systems to track student behavior (e.g. filling out a web form after clicking on a link in an email sent through the CRM, class attendance, retention systems) 7) Tracking behavioral movements through campus systems (scanning cards) 8) Workspaces for stakeholders (recruiters, experience team, faculty, alumni office)	John Frost & Derek Bierman	On Track	On Track	On Track	On Track	Behind	Behind	Behind	Met with consultants to scope replacement of FrontRush. A scope will be defined in the coming weeks.

Upon accreditation, implement marketing plans for CACREP and ABET	CACREP Spring 2022; Engineering Fall 2022 pending ABET determination	Lorie Cook-Benjamin & John Frost (VP&M)	Started	On Track	On Track	Complete - Success					CACREP Accreditation granted. ABET accreditation granted.
Add a women's wrestling program to start in fall of 2022.	Begin recruiting during 2021-2022 to start program in Fall of 2022 with 20 students-athletes.	Mark Wateska	Complete - Success	Complete - Success		Complete - Success					Achieved 20 students in fall of 2022. Continuing to recruit for fall 2023.
Esports proposal to begin Fall 2023.	Launch in Fall 2023 with ?? in fall 2023 and 30 by Fall 2024. Added 11/2022	Derek Bierman, Mark Wateska, John Frost					Started	Behind	On Track		On track to recruit for fall 2023.
Increase residential and non-residential international student enrollment by 30% by fall 2023	-In academic year 2022-2023, re-launch and identify new strategic international recruiting locations; increase international transfer recruiting in Nebraska and community colleges in the Midwest.	Luis Sotelo & John Frost	Started	Started	On Track	On Track	Behind	Behind	On Track		A recruiting trip has been planned to Bogota, Colombia and Panama City, Panama at the end of April 2023 to visit local high schools to recruit students. These schools match the student profile that can successfully attend Doane University, financially and academically.
B. Design and implement a revised financial award process to improve the residential discount rate											
Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23		
Redesign financial aid awarding strategy to lower the discount rate to below 67% for FY 22-23 incoming first-year, first-time, residential students.	Design a tool for each area to track the discount rate for their area in order to reduce the discount rate (<67%) for Fall 2022 across entire first-year residential class, and for subgroups in Athletics and Performing Arts. Continue to revise process.	Marty Fye/ John Frost (VP&M)	On Track	Complete - Fail						Recruited 239 FY (goal 275) students with discount rate of 68.9% (goal 67.5%). Overall rate of 67.31%. Recruited 34 transfers (goal 50).	
New goal for Fall 2023, residential: 300 first-year students, 50 transfer students at 64% discount rate.	New goal for Fall 2023, residential: 300 first-year students, 50 transfer students at 64% discount rate.	John Frost				Started	Behind	On Track	On Track	See Board report for details on recruiting	

CULTURE										
WE WILL improve organizational engagement and shared governance										
Strategy										
A. Define and implement appropriate principles of shared governance										
Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Define and implement principles of shared governance	Adopt principles of Shared Governance and recommendations from Shared Governance Report and HLC report. Complete implementation by October 2022	Roger Hughes	On Track	On Track	On Track	On Track	On Track	On Track	On Track	New Shared Governance Steering Committee had first meeting in January.
B. Continue to improve engagement, inclusion, and belonging to unite, attract, develop, and retain talent										
Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Administer faculty & staff engagement survey to assist in developing a culture to support Doane's mission and values.	Conduct second engagement survey during this strategic planning process. Implement New Employee Welcome meetup. March - April 2022. Results received in June 2022 and shared. Implement survey again in spring of 2023.	Anne Ziola	On Track	On Track	Complete - Success					Results shared with employees and Leadership Team. Relaunch in March 2023.
Relaunch Strategic plan	Facilitate feedback from Employees and Board Deliver to Board for Approval in April 2022. Launch next planning process for 2023-2026.	Roger Hughes	Started	On Track	On Track	On Track	On Track	On Track	On Track	Action Teams submitted Strategies. Reviewed by Leadership team for consistency and form. Ready to share Tactics with operational areas for feedback and Board.
New Employee Welcome Program: Establish a comprehensive program designed to provide new employees information to help them achieve success in their new role and feel welcome and included as a member of our University Community.	Implement the program in Spring 2022	Anne Ziola/Luis Sotelo	Complete - Success							Program has launched and several cohorts have gone through the welcome program, which includes a DEI component. New Welcome Program for staff includes a 3 session onboarding plan with Orientation on the first day, New Employee Onboarding Part I and New Employee Onboarding Part II. A welcome program for faculty was also initiated. HR had never been involved with faculty development previously. This now includes an orientation and mission/values discussion along with headshots, benefits description, and visits from important areas like the Service Center and the Leadership Team.
RFP for New Insurance Broker and Insurance Providers to improve offering to employees and best cost management for Doane and Employees	Send (RFP) for an open request for bids for new vendors to provide health insurance services. Completed Nov 2021. Select insurance vendor March 2022. Metric - Secure new vendor with plan for improved customer service, offerings and a better mix of rates - Due by 9/1/22	Linda Scholting/Anne Ziola	Complete - Success							Changed vendors to UHC effective 9/1/22 and realized savings by offering new rates to employees that were much more favorable than the 6% increase planned by BCBS
Organizational Development: Establish HR and DEI frameworks and tools to ensure continuous process improvement, delivery of HR services, and the employee experience	Implement new applicant tracking module - July 2022 (January 2023) Implement new electronic position management module - July 2022 (January 2023) Convert to electronic employee records - Winter 2022 <remove> Implement employee performance feedback tool - Spring 2023 Develop employment dashboards and metrics. This will include areas like new hires, turnover, time to fill positions, and more. Summer 2022. Develop equitable search process that includes search committee training and a manual. Spring 2023	Anne Ziola/Luis Sotelo	On Track	On Track	On Track	On Track	On Track	On Track	On Track	The equitable search process will be chaired by Sara Weixelman in HR and Wendy Hunt in DEI. One faculty council representative and one staff council representative will join the committee. Trustee Kim Heier has also agreed to serve on the committee. This committee will produce a guidance document by the end of spring 2023, so this work is on track.

<p>Personal and Professional Development: Create and implement programs that focus on strengthening the skills of employees and providing information and guidance to help them grow as professionals.</p>	<p>Inclusive Excellence Leadership Program, Cohort 1 graduates fall 2022 Clifton Strengths- Spring 2022 Manager and supervisor training like Leading with Emotional Intelligence, Providing Honest Feedback to Employees, the Effects Unconscious Bias, Human Resources in Management, Fall 2022</p>	<p>Anne Ziola / Luis Sotelo</p>	<p>On Track</p>	<p>On Track</p>	<p>On Track</p>	<p>On Track</p>	<p>On Track</p>	<p>On Track</p>	<p>On Track</p>	<p>We are wrapping up the third series of Doane Dialogues which provides professional development around DEI topics. The second cohort of Inclusive Excellence Leadership Program will start in March 2023.</p>
<p>Creation of policies and procedures for internal and external communications surrounding Doane University's key initiatives, new academic offerings, positive/negative publicity, crisis situations and media and public relations responses.</p>	<p>Documented policies and procedures, education and training for key faculty and staff participating campus communications. Monthly public sentiment reports from the Marketing/Communications Division to the Office of the President. Fall 2022.</p>	<p>John Frost</p>	<p>Not Started</p>	<p></p>	<p></p>	<p></p>	<p>Started</p>	<p>On Track</p>	<p>On Track</p>	<p></p>
<p>Design yearly system-wide diversity, equity and inclusion climate survey and track year over year improvement to identify areas of strength and growth.</p>	<p>Completion of survey design and delivery by Fall 2022 Analysis completed by Spring 2023</p>	<p>Luis Sotelo</p>	<p>On Track</p>	<p>On Track</p>	<p>On Track</p>	<p>Behind</p>	<p>Behind</p>	<p>Behind</p>	<p>On Track</p>	<p>The DEI Climate Survey opened January 2023 and data collection will continue until the end of February 2023. Analysis of the data will begin after the survey closes and a report will be provided by May 2023.</p>
<p>Accelerate achievement of inclusion and belonging outcomes by empowering units across the university (15 currently) to complete DEI audit to identify strengths and growth areas and complete 2-year action plans.</p>	<p>-DEI Division provides ongoing technical assistance to DEI Action teams in creation of unit-level DEI strategy, targets, outcomes, and metrics on a yearly basis, ensuring alignment with HLC's diversity, equity and inclusion criteria and Doane University's three DEI Commitments. -DEI Division produces a strategy guidebook to assist DEI Action Teams lead DEI outcomes at the unit level by Spring 2023 -Units establish or reestablish DEI Action Teams and meet regularly to complete 2-year action plans by Spring 2023 -University re-launches DEI Leadership Council by fall 2022 composed of DEI Action Team leaders to meet every other month.</p>	<p>Luis Sotelo</p>	<p>On Track</p>	<p>On Track</p>	<p>On Track</p>	<p>On Track</p>	<p>On Track</p>	<p>Behind</p>	<p>On Track</p>	<p>DEI Specialist Wendy Hunt and VP of DEI Luis Sotelo have relaunched the Forward Together DEI initiative. As part of the relaunching efforts, both leaders are conducting listening sessions with the ~15 action teams in order to make improvements to the initiative and provide additional technical support and education to the action teams.</p>

OPERATIONS

WE WILL improve operational efficiencies and ensure economic viability of the university

Strategy

A. Improve operating margin

Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Establish and improve internal controls and processes	FY 22 - 1) Develop Matrix for signature authority on Contracts. 2) Implement new contract renewal process 3) Establish a Capital Approval process for new Capital 4) Engage external consultant to perform an assessment of controls and process - Completed 12/21 5) Develop a process to ensure fair and timely review of Position replacements and new hires- Completed 11/21 5)Review Chart of Accounts and GL Structure to improve and simplify, producing more accurate information . 6) End users will be able to understand and make better financial decisions with information uploaded into Prophix	Linda Scholting	On Track	On Track	On Track	On Track	On Track	On Track	On Track	New invoice process developed, new contract process established, capital approval process established, chart of accounts reviewed, prophix monthly review implemented.
Implement new budget process & tool to increase leader involvement, transparency and usability of information	1) Successful selection and implementation of a tool for the FY 23 Budget; 2)Create transparency and usability of a software to develop and share budgets, create transparency and ownership, and include ongoing reporting on the budget to actual results; 3)Ensure users are properly trained. 4) Develop Enrollment and Tuition Pricing Budget by including all key stakeholders 5) Report budget for approval Oct 22	Linda Scholting	On Track	On Track	On Track	On Track	On Track	On Track	On Track	Prophix Revenue planning build out in Prophix in progress ; work is being completed now through, and is expected to be completed in early March
Manage S&P information and reporting process to ensure best rating for Doane	Complete the S&P process in support of the best rating for Doane- Completed 2/22	Linda Scholting	Complete - Success	On Track	On Track	On Track	On Track	On Track	On Track	Completed in February 2022 with satisfactory A- rating. No update on current year. Waiting for communication from S&P to schedule our check in and will review survey with them at that time. Estimated timeline 2/2023.
Improve financial operations - month end close, reconciliation, and controls	Improve financial operations - month end close, reconciliation, and control by 1) Developing standard reporting for leadership and boards and 2) Establishing a new calendar to reduce closing time by 5 days 3) Establish a process for timely review of account reconciliations to ensure financials are accurate. January 2023.	Linda Scholting	Started	Started	On Track	On Track	On Track	On Track	Behind	Creation of month end close schedule and tweaking list of activities to be performed/completed during that process. Meeting with consultant to automate Doane financial statement creation.
Cost efficiencies.	Retained ERA to assist doane with RFP and looing for cost savings	Linda Scholting					Started	On Track	On Track	ERA has launched a group of meetings to begin work. RFP for dining hall services is underway with visits on 2/17 led by Judy
Develop a financing plan to support the new capital expenditures (Student Res. Hall and President's House and Event Center)	Finalize long term financing options in tandem with final construction bids (August) to support the projects. Include options for analysis including bond financing, endowment down payment/spending and private loans. August 2022	Linda Scholting	On Track	On Track	Complete - Success					Bids and contracts are complete and loans secured

B. Cultivate a digital first and data-informed culture

Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
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Improve processes and data through enhanced use of technology	<p>Projects from capital list:</p> <ol style="list-style-type: none"> 1) Implement a cloud phone system 2) Harden Doane's cyber security posture 3) Modernize Doane's technology infrastructure through: upgrading Network / Wireless and Network Core, Production Server Environment, Cooling Racks, Fiber Ring, Storage systems, Infrastructure battery/conditioning 4) Implement VDI for students, faculty, and staff 5) Implement modern payment systems for automation and student experience: Nelnet Student Payments, Nelnet Non-student Payments, Food service upgrades such as Nelnet Bluefin P2PE, and POS 6) Implement digital door locks to work with app (beta). 7) Explore Identity and Access Management 8) Implement mobile Campus App 9) Implement Microsoft 365 10) Utilize Digital First Consulting (FIN, STU, HR) 11) Implement Salesforce to digitize operations 12) Implement Budgeting Analytics (Prophix) 13) Implement Digital Talent Management (PeopleAdmin) 14) Identify and help with Advancement Project(s) 15) Implement annual Laptop/Computer Refresh 16) Implement Remote Monitoring and Management (RMM) 17) Grow KANE / ServiceNow to improve tech operations 	Derek Bierman	On Track	On Track	On Track	On Track	Behind	On Track	On Track	<ol style="list-style-type: none"> 2) Harden Doane's cyber security posture - activities will take place January - Feb. 3) Modernize Doane's technology infrastructure: All contracts have been signed. 4) Implement VDI: All contracts have been signed. 5) Implement modern payment systems for automation and student experience: Nelnet Student Payments, Nelnet Non-student Payments, - Will be completed by February. 6) Implement digital door locks to work with app (beta). - We have one beta working. 8) Implement mobile Campus App - Designing a new solution. 10) Utilize Digital First Consulting (FIN, STU, HR) - Active 11) Implement Salesforce to digitize operations - Active 	
Continue to make progress on GLBA compliance.	Added 12/2022	Derek Bierman							Started	On Track	Security projects are scheduled to be completed in February.
Audit, organize and overhaul current doane.edu website content to improve the user experience	Documented IA/Sitemap for doane.edu. Discovering top needs of the doane.edu audiences through the facilitation of user research and focus groups. Launch April 2022. Establish objectives for website Phase 2 by 9/22.	Derek Bierman	Complete - Success								Website is live in July, in compliance with new security protocols. Website redesigned for compliance with CMS and CRM.
C. Enhance processes to assess programs on a systematic basis											
Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23		
Develop new capital committee process to be an intake for new or revised projects, and to report to leaders and the board changes in plans	<p>Quarterly Capital and IT Project Reports. Approved projects < \$100,000; Develop process; communicate new process to leaders at Doane; July 1, 2022.</p> <p>New committee meets monthly to discuss projects.</p>	Linda Scholting / Derek Bierman	Behind	On Track	Complete - Success					Committee is up and running monthly	
Ensure facilities are positioned for growth and efficient utilization by completing an effective space planning utilization study and implementation plan.	<p>We will track the projects and report on campus renewal and replacement projects, the costs of implementation, the benefits of implementation, etc. To have the space planning utilization study and implementation plan by February 2020. Evaluate debt financing to support strategic objectives. August 31, 2022.</p> <p>Waiting to develop Master Plan until new Strategic Plan developed.</p>	Linda Scholting	On Track	On Track	Discontinued	Discontinued	Discontinued	Discontinued	Discontinued	Waiting for the strategic plan to develop master plan	
Develop a new process for evaluation of programs for sustainability.	Develop a process that includes financial data, deeper evaluation of feasibility, and program impact (outcomes and quality). September 2022 draft, May 2023 completion.	Kris Williams	Started	On Track	On Track	On Track	On Track	On Track	On Track	Data collected for Athletics. Continuing collection of academic data.	

ADVANCEMENT and ALUMNI										
WE WILL foster an engaged and supportive community of										
Strategy										
A. Enhance current fund-raising efforts to increase financial support										
Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Broaden and deepen engagement with alumni, faculty/staff, and students.	1) Increase organic annual fund goal to \$650,000. 2) Increase alumni participation rate from 14% for the Crete campus to 16%. 3) Increase faculty and staff participation rate from 50% for the Crete campus to 52%.	Marty Fye	On Track	On Track	On Track	On Track	On Track	On Track	Behind	We should be at 60% of goal and we are at 51%, no greek phoneathon impacted these numbers. We will do a phonathon effort in Feb. and March and we hope to catch up.
Plan the comprehensive campaign	Complete the feasibility study and begin the silent phase of the campaign. 1/30/2023	Marty Fye	Started	Started	On Track	On Track	On Track	On Track	On Track	Visiting top 50 donors and connecting with the 33 folks we visited with for the feasibility study to share the outcome.
Manage, analyze and leverage the data needed to engage and steward donors.	Implement products and services that will help us better understand our donor base. This technology and the team making 700 personal visits will help us engage and be better steward of our donor base. 6/30/2023	Marty Fye	On Track	On Track	On Track	On Track	On Track	On Track	On Track	we continue to leverage data with our technology and narrowing the prospects to those most likely to give \$10K or mor for the campaign. The President and I are focused on prospects who can give \$100K or more.
Finish fundraising for fine and performing arts facility	Gifts and pledges of \$12M total for the Fine and Performing arts projects by 12/30/2022.	Marty Fye	On Track	Behind	Behind	Behind	Behind	Started	On Track	Working with donors and foundations to move this project forward. We have decided to wrap it into our campaign. We still hope to have plans by next fall.
Continue Doane's strong record of grant activity, including major federal agency and national-level foundation grant submissions in partnership with McAllister & Quinn (M&Q) and grant submissions by faculty and staff through the grants office.	During FY2022-23: Submit at least four major grant proposals with M&Q using the full suite of services (writer, IPR, copy editor) and 16 additional grant projects with Doane faculty and staff. Maintain a successful award percentage of 50%. Meet or exceed the FY2021-22 total of \$1.6M in funding.	Marty Fye	On Track	On Track	On Track	On Track	On Track	On Track	On Track	We were just notified of a new grant for \$500K that may help with scholarships for students in our (MAC) Masters of Arts in Counseling
B. Educate, engage, and empower alumni and friends to support Doane through non-financial means										
Tactic	Deliverable and Timeline	Champion	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	
Tap into alumni intellectual capital and business acumen by working in partnership with the Career, Leadership, and Service (CLS) to engage our alumni and current students.	Work in partnership with the CLS to engage our alumni and current students in a workshop with the goal to engage alumni intellectual capital and business acumen to impact our student's career interest as well as life after college. Re-connect our alumni. Summer 2022.	Marty Fye	Complete - Success	On Track	On Track	On Track	On Track	On Track	On Track	Alumni Fire has been released, it's software that engages alumni in their Doane experience. Beginning stages of our campaign event schedule for this summer in 6 cities, Lincoln, Omaha, KC, GI, New England,MN
Identify and prioritize a list of future projects that supports students in their core learning programs: Academic, residential, experiential and international experiences.	Create the list of next projects to focus on for future during Summer 2022.	Marty Fye	On Track	On Track	On Track	On Track	On Track	On Track	On Track	Working on efforts with our new honors program for financial support. Travel awards for the program to assist with expenses for study or travel away.