Dear Members of the Board:

I am pleased to present for your review and approval a new strategic plan for the University: *Transforming Loyola 2014*.

In the previous academic year I promised the Board, as we complete our last strategic plan, that we would develop an integrated strategic plan for the University, and we have. This plan is a culmination of over 15 months of extraordinarily productive work by faculty, staff, vice presidents and provost. It has involved all of our normal structures of shared governance, and in fact has served as a model of collaboration among all of the University’s units. The Board’s input into the strategic planning process over the course of the past year has been invaluable and integral, and has been greatly appreciated. We have developed an integrated plan that is, at its heart, learning centered. *Loyola 2014* focuses on educational substance in academic and student life. I think it is an integrated plan in terms of action items, finances, and facilities and I think that it will move forward the University’s mission, and coheres with the “Faith in the Future” campaign that is making its public launch at this Board meeting.

Loyola’s strategic plan is a living document guided by the University’s mission, vision and values statement that focuses on cultivating a learning centered community that is 1) dedicated to a high-quality, experiential, and values-based education, 2) devoted to students’ discovery of their career and a life of service, 3) infused by the cultures and traditions of New Orleans, and 4) rooted in the Jesuit and Catholic mission of the University. Like any other strategic plan, it needs to be an organic document that evolves over the life span of the plan, during which planning leads to implementation, implementation leads to evaluating, and evaluating in turn returns us to planning.

Metrics for the high priority actions plans of the Strategic Plan have been developed and are included herein, as is a timetable for the life of the plan. I will ask the appropriate University and Board committees to monitor implementation of the strategic plan in the years to come.

On Thursday, October 9th Marc Manganaro and Bill Locander, the co-facilitators of the Strategic Planning Team, will present the strategic plan to the Academic and Student Affairs Committee for further discussion and as an action item. At our October meeting the Academic and Student Affairs committee will bring their recommendation to the full Board.

Sincerely,

Kevin Wm. Wildes, S.J. 14 September 2014
President
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The Strategic Plan Executive Summary

Loyola University New Orleans’ strategic and operational plan is designed to guide the University into the next decade. Although Loyola recently celebrated its centennial anniversary, the University still must navigate through the challenge of an ever-changing educational environment.

This plan is both strategic and operational in that it aligns strategic initiatives and actions designed to deliver value to our various stakeholders. This plan calls for our university to fulfill the promise found in Loyola’s mission which “welcomes students of diverse backgrounds and prepares them to lead meaningful lives with and for others; to pursue truth, wisdom, and virtue; and to work for a more just world.”

The plan calls for the university to focus activities on four overarching strategies to cultivate a learning-centered community

- dedicated to a high-quality, experiential, and values-based education.
- devoted to students’ discovery of their career and a life of service.
- infused by the cultures and traditions of New Orleans.
- rooted in the Jesuit and Catholic mission of the University.

In order to ensure that our over-arching strategies succeed, it is imperative that the University recruit and retain high-quality faculty by enhancing support for faculty development in teaching, scholarship and creative work. We also realize that the kinds of activities outlined in this plan often form a distinctly secondary part of faculty evaluation. Experiential learning, developmental and discerning advising, community engagement, formation for mission, and other activities with or on behalf of our students are not discouraged, but because they are not generally rewarded they tend to be engaged in by a relatively small percentage of the faculty. They must be embraced by all if this plan is to succeed, and so a recalibration of faculty evaluation processes will be needed.

University Mission

The starting point in the strategic planning process, as in all other endeavors, must be the mission of the University, which was approved by Loyola University New Orleans Board of Trustees, March 5, 2004:

Loyola University New Orleans, a Jesuit and Catholic institution of higher education, welcomes students of diverse backgrounds and prepares them to lead meaningful lives with and for others; to pursue truth, wisdom, and virtue; and to work for a more just world. Inspired by Ignatius of Loyola’s vision of finding God in all things, the university is grounded in the liberal
arts and sciences, while also offering opportunities for professional studies in undergraduate and selected graduate programs. Through teaching, research, creative activities, and service, the faculty, in cooperation with the staff, strives to educate the whole student and to benefit the larger community.

The Mission is the cornerstone of our university. We are and will remain an academic community fully committed to the pursuit of truth, wisdom and virtue; diversity in our student body, faculty, and staff; excellence in teaching, scholarship, creative work, and service; the education of the whole student; and providing benefit to the larger community. This Strategic Plan will focus on particular aspects of our larger mission that we feel are best positioned to guide the transformation of Loyola to better meet the needs of our various stakeholders.

Loyola University New Orleans builds on a rich tradition of Jesuit education and the colorful background of New Orleans to create an enriching experience for students. As Loyola prepares to reposition itself within today's higher-education climate, it remains rooted to its foundational values.

**Loyola's Strategic Advantages**

The Jesuit vision of education is a transformative one: the student is called on both to understand things as they are and to look beyond present realities for the magis. Similarly, the Strategic Planning Team went through a process of evaluating where Loyola is now and where we would like it to go. This process involved a good deal of discussion and a number of group and individual exercises, some of which are included in this document. We sought throughout to create a plan that would both reflect each unit of the University and at the same time challenge each unit to become a better version of itself.

What makes Loyola University New Orleans distinctive? This question is critical in understanding who we are and who we want to become, and a good answer is essential in our interactions with prospective students and their parents, prospective faculty, and others. In our discussions and deliberations and through examining Loyola's strengths and environmental opportunities, six sustainable strategic advantages emerged:

1. One of Loyola’s great strengths is the diversity of its student body, and Loyola consistently has been recognized as one of the most diverse campuses in the nation. The University should be attentive to recruiting and retaining diverse faculty and staff as well as a diverse student body, and should ensure that it is providing advocacy for all members of the Loyola community and programming on issues of diversity.

2. The City of New Orleans offers an exciting venue for student involvement due to its “rebirth” as an entrepreneurial city and a city where commerce (domestic and international) and the arts are thriving.
3. Loyola is a faith-based university that integrates a liberal arts curriculum with professional programs of study in an atmosphere that promotes community and fosters personal growth as well as career development.

4. Loyola’s Jesuit/Catholic identity represents a brand which connotes excellence in education in a values-laden climate. Capitalizing on this identity by continually improving the quality of students’ experience-based education will attract better and more motivated students. It is important that Loyola use this identity as part of its value proposition to prospective students seeking a career after graduation.

5. There is a potential strategic advantage in the continued development of Loyola’s physical facilities and infrastructure—the recently completed renovations of Monroe Hall are refreshing proof of how improvement of physical facilities can transform a campus. If resources permit, this can be a strategic advantage; if Loyola falls behind in this area, it will become a vulnerability.

6. Loyola has for decades been developing superb, nationally-known programs. Loyola must distinguish itself in the future by even more deliberately and nimbly creating signature programs which attract top-flight faculty and students.

**Loyola’s Strategic Vulnerabilities**

At the same time, transformation requires understanding areas of weakness. After examining environmental threats and institutional weaknesses, seven areas to address were identified:

1. Loyola is “stuck in the middle” with respect to competitors. As an institution it neither holds a strong niche position nor offers broad-based differentiated offerings. It is vulnerable to being out-niched by smaller schools and out-gunned by larger public universities.

2. Loyola is presently not nimble enough to be responsive to environmental changes. The university’s structure encourages an insular culture and inhibits cross-college coordination.

3. While Loyola operates from a solid core of values, some of the infrastructure (IT, physical facilities, campus beauty, etc.) must be updated and improved.

4. Loyola does not enjoy a competitive advantage among better qualified students and students most willing to pay for private higher education. Loyola consistently remains the first choice school for students who perceive us to be a reach school academically and financially. While this speaks volumes about mission, it puts us in the position of mission appeal outpacing the institution’s ability to fund these students and provide costly support services.
5. Loyola’s lack of an agreed-to value proposition and its appropriate marketing have created a muddled image in the minds of potential students and their families.

6. Loyola’s current financial situation threatens its long-term viability and the ability to invest in new signature programs that will attract top students and faculty.

7. Recent studies, by the Lawlor Group, and from other sources, underscore that there is a disconnect between our self-image and the way we are perceived by our potential students.

It became clear as the Strategic Planning Team considered these advantages and challenges that the core of any strategic plan would focus on our work with students, from the earliest stages of recruitment to successful graduation and beyond. To adapt a phrase, it takes a campus to graduate a student. As we seek to transform our students, so we transform ourselves and our community. In this way, we began to think of ourselves as ideally a learning-centered community, focused first and foremost on providing an excellent education and formative experience for our students but recognizing that this requires a continuing process of learning on the part of the entire Loyola community. We call on the entire community to participate in the process of cultivating, enhancing, and sustaining this learning-centered community.

A learning-centered community
By choosing the theme of a “learning-centered community,” we mean to say that the next decade at Loyola will be one where students become ever more central to every aspect of the life of the university.

In the classroom, students will be inspired by faculty who will even further engage them in the Ignatian tradition of education, learning through context, experience, reflection, action, and evaluation. In this model, faculty members will act as facilitators of knowledge rather than merely lecturers, and students will be challenged to explain answers rather than just “give” them. Students will be challenged to learn not just what to think, but how to think.

Both in and out of the classroom, students will learn to live the magis in their work and in their lives. A learning-centered community in this Jesuit sense embraces the notion that the development of meaning in one’s life is critical preparation for action. Putting students first will allow us to focus on the individual development of each Loyola student, in the spirit of cura personalis. The ultimate goal is for students to become productive and compassionate participants in a complex world, able to care for both themselves and those around them—locally, nationally, and globally.

The success of our students depends upon the quality and commitment of the faculty and staff who guide them in this educational endeavor. It is therefore essential that Loyola continue to recruit and retain high quality faculty and staff by increasing support for their development in areas where we can best serve our students.
In the end, if we are able to graduate students who both find careers about which they are excited and personal lives that they find enriching, then we will have wholly fulfilled our promise to our students and their families: Loyola is a place where students learn the creativity and courage to choose what they become.

The Strategic Plan

The four overarching strategies embody specific aspects of this learning-centered perspective that we believe can benefit from focused attention:

- **Dedicated to a high-quality, experiential, and values-based education:** this is obviously at the heart of what we do as a university, and from that perspective is arguably not new. In the spirit of the *magis*, however, we can strive to do more and do better. Here we focus on experiential learning, especially specific high-impact practices, and the care of the whole student, including co-curricular programs and academic support. These are aspects of higher education that are popular in many quarters, but they flow naturally from our Jesuit mission, and they build on strengths that we already have. At the same time, they acknowledge changes in our student population.

- **Devoted to students’ discovery of their career and a life of service:** our roots are in the liberal arts, but Loyola has always sought to balance the ideals of liberal education and the realities of career preparation. We want our students to think about more than a paycheck, but that doesn’t mean they don’t need that paycheck. The value proposition of a Loyola education can in many ways be most strongly seen here, by what our students go on to do and who they become. Helping them find the fullness of their various callings is the job not only of a strong Career Services Center, but also of faculty advisors, alumni, and indeed the whole campus community.

- **Infused by the cultures and traditions of New Orleans:** much of what makes us truly distinctive comes from our physical location. New Orleans is a unique city, an international port with long historical roots. Widely touted as the birthplace of jazz, New Orleans had an opera house before New York did, and that cultural diversity plays out in every medium, from visual arts to food. More recently, Louisiana has overtaken Los Angeles as a center of filmmaking. All this and more makes Loyola an ideal place for students from all over the country and beyond to come learn about the world, and about themselves. We are firmly embedded in our community, but we can enhance that commitment, market it more effectively, and bring our students more strongly into the rich cultural gumbo that is our home.

- **Rooted in the Jesuit and Catholic mission of the University:** in a very real sense, mission underpins the first three strategic initiatives, so it could be argued that no more needs to be said on the subject. In true Jesuit fashion, however, we want to be
intentional about the formation of students, and indeed all members of our community. The action plans articulated here make explicit a commitment to our mission that is implicit elsewhere and ensure that conversations about mission take place at every level of our campus.

The substance of these four overarching strategies is not new to Loyola, nor do these strategies encompass the entirety of the learning-centered community they represent. For instance, innovative teaching and experiential learning can be found in many parts of our campus, from first-year seminars to core major courses to capstone experiences and graduate seminars. Moreover, the scholarship and creative work engaged in by faculty often has a close relationship to their work with students in and out of the classroom. By choosing specific areas for attention, the strategic plan does not deny the value of others, but we hope the work done in these areas will enhance those others as well.

Loyola’s four overarching strategies will be achieved through a series of action plans described below:

**Cultivate a learning-centered community,**

1. *dedicated to a high-quality, experiential, and values-based education*
   a. Ensure that each student will engage in at least two experiential-based practices which may include:
      - Collaborative research
      - Community engagement
      - Internships
      - Study abroad and global immersion
   b. Develop an integrated co-curricular program that offers personal, professional, physical & spiritual development opportunities, which engage students in the life of the campus.
   c. Centralize academic support services that create highly visible space to foster independent and mentored student learning and success.
   d. Develop, review and revise college organizational structures and programs.

2. *devoted to students’ discovery of their career and a life of service*
   a. Transform Loyola’s Career Services to make it a signature program and recruitment tool.
   b. Create a new model for advising that is collaborative across academic and non-academic units and that focuses on student development, not just progress toward degree.
   c. Develop the network of Loyola alumni and friends who support students’ exploration of a variety of career paths and a life of service through internships, summer jobs, and other engagement.
d. Design and implement an e-portfolio program, which all undergraduate students will use to compile a holistic record of and reflection on their Loyola experience.

3. **infused by the cultures and traditions of New Orleans**
   a. Create a new model for collaboration that provides a support structure to engage the Loyola community directly with New Orleans.
   b. Increase opportunities for students to interact with the cultures, traditions, and location of New Orleans through their coursework.
   c. Create a marketing campaign that highlights Loyola’s connections to New Orleans.
   d. Create and enhance programs that will supply graduates for growing-demand professions in New Orleans.

4. **rooted in the Jesuit and Catholic mission of the University**
   a. Expand formation of students, faculty, and staff in Loyola’s Jesuit identity through integration of spirituality, justice, and the intellectual life.
   b. Integrate Ignatian principles of discernment into advising, career planning, and support for lives of service.
   c. Tie course-level student learning outcomes to aspects of Loyola’s Jesuit and Catholic identity, such as its commitment to justice and ethical conduct.
   d. In pursuit of solidarity, increase opportunities for students, faculty, and staff to connect to, collaborate with, and support Jesuit ministries in New Orleans and beyond.
   e. Integrate into the hiring process the opportunity for all job candidates to articulate how they perceive themselves contributing to the university’s mission.
CREATING THE PLAN

Strategic Thinking Journey

The road to this strategic plan has been a 15-month-long journey of scrutiny, deliberation, and collaboration as shown in the following diagram. The strengths and perspectives of many groups have been harnessed to map out a new course for Loyola to steer it into the future.

Spring 2013

The Student Success Summit rendered the report of workgroups.

May-June 2013

University Strategic Planning Team identified preliminary strategic initiatives.

June-August 2013

Strategic Planning Team developed first of five drafts.

September 2013

A current situation document was developed to frame the thinking of the SPT.

September 2013

An alignment exercise was conducted to understand the horizontal and vertical implementation issues.

October 2013

Service Quality GAPs identified by SPT.

Oct/Nov 2013

7 initial strategic initiatives identified.
Strategic Thinking Journey

Dec 13- Jan 14
Consolidated Strategic Initiatives identified.
University Deployment Process
SPT consents on 4 consolidated initiatives and examines a university deployment process.

Feb-Mar 2014
Loyola’s Four Overarching Strategies Identified

April-May 2014
The Action Plans of the four overarching strategies identified

June-August 2014
High priority action plans identified.
Feedback from campus community elicited through intranet website

September 2014
SPT Members attended college assemblies and VP unit meetings to elicit additional feedback.
Report of Strategic Plan Completed
Loyola University New Orleans is surrounded by rapid changes in academia and the U.S. economy, a growing global workplace, and it is situated in a city that is redefining itself. In this landscape, the need for Loyola to transform itself to meet the needs of a diverse and changing student population is more important than ever.

In the spring and summer of 2013, as they began developing a new strategic plan, Loyola’s Strategic Planning Team members participated in an exercise called “Our Main Thing” to get a better sense of how we envision ourselves. This exercise was focused on answering the questions, “Who are we? How is Loyola distinctive? What do we mean when we say Loyola is a Jesuit university?” The following statement was drafted in answer to the three questions:

Loyola University New Orleans prepares students to have the creativity and courage to choose what they become. We build on the Jesuit reputation for excellence in education so that critical thinking, ethical behavior and a sense of social justice become second nature with our graduates. The campus offers an environment that inspires students of diverse backgrounds to question, explore, debate, create, and to grow as a whole person.

Our students are prepared for life after graduation with skills from experience-based learning and by networking with alumni and other professional leaders in a region that is an incubator for environmental science, technology, medicine, transportation, energy, small business, music, the arts, and tourism. Our vibrant campus life in New Orleans, one of our country’s most distinctive cities, helps students develop a global view of society’s challenges and opportunities for betterment.

Excellent faculty teach small classes that emphasize knowledge, analytical skills, and values across disciplines, in combination with focused study in the humanities, arts, social and natural sciences, business, and law. No other college or university in the United States offers such a singular educational experience.

Rooted in Jesuit-Catholic tradition and drawing on contemporary ideals of liberal education, a Loyola education transforms students into leaders in their chosen vocations and ethical members of their community.
Environmental Analysis

In order for Loyola University New Orleans to position itself more effectively for the future, we must understand both the environment in which Loyola currently finds itself and that which the University will encounter in the future. The Environmental Analysis found in Appendix I outlines current and future economic and educational environments, the contexts and expectations of the students, employer expectations, and the employment outlook.

The following environmental influences were prominent in the development of the Strategic Plan.

I. Economic Environment
   a. Universities, public and private, are faced with economic pressures that will require that they become increasingly more economically efficient and educationally effective.
   b. The cost of higher education has risen faster than inflation for several years, bringing about criticism from the media and other stakeholder groups.

II. Educational Environment
   a. The increasing economic pressure on higher educational institutions has spurred the need to prove the value of an educational experience.
   b. Career preparation is the top reason to attend college.
      i. To be able to get a better job, 83%
      ii. To get training for a specific career, 79%
      iii. To be able to make more money, 74%

III. Student Experiences – Students are looking for experiences during college which influence their college choice. Engagement opportunities, co-curricular and extracurricular, are important in college choice. Community engagement through service learning and other “hands on” experiences are particularly meaningful to college age students. Student Affairs activities (athletics, recreational facilities, residential living concerns, and common gathering areas and services) are important in attracting and retaining students.

IV. Student Financial Issues
   a. The rising tuition and fee costs for higher education are shown in a College Board study which reports that for 2012-13 the average total charges for an in-state public university were almost $18,000 and $31,000 for out of state students.
   b. For the same year, students at private, non-profit colleges paid on average $39,500 (College Board).

V. Student Needs/Expectations
   a. In the CIRP national study of 200,000 freshmen reported that:
      i. 88% of freshman say their reason to go to college is to get a good job,
      ii. 75% to be able to make more money.
iii. 40% of first generation freshmen indicate they had “very distracting and troublesome” financial problems. (Number held steady past six years.)

b. In a university-wide survey of first-time, full-time students at Loyola, 471 respondents (75% response rate) reported their reasons for applying and enrolling at the university. The weather in New Orleans and academic programs were the top two reasons for applying to Loyola. However, financial reasons were, by far, the top factor in enrolling at Loyola

VI. Employment Opportunities
(Results are mostly taken from the report *Recovery: Job Growth and Educational Requirements through 2020* by Georgetown University’s Institute for Public Policy.

a. By 2020, 65% of all jobs in the economy will require post-secondary education and training beyond high school.

b. There will be 55 million job openings in the economy through 2020: 24 million openings from newly created jobs and 31 million openings due to baby boomer retirements.

VI. Employer Expectations - A special report from the *Chronicle of Higher Education*, March 2013, reported the following:

- Employers value four-year degrees more than ever.
- But one-third suggest that colleges do a poor job of preparing students for today’s workforce.
- 53% say it is difficult or very difficult to find qualified graduates.
- Most employers in the survey say colleges are not adequately preparing students in written and oral communication, decision-making, and analytical and research skills.
- A strong liberal arts education, producing well-rounded individuals, is still highly prized, but the graduate needs to be versed in fundamental skills that include communication (especially the ability to write and to speak), basic technical skills for the digital environment, the ability to discern and to think – to solve problems and to create new opportunities.
SWOT Analysis

Part of the Jesuit tradition is the examen, a means of evaluating the good and the bad. The examen can lead to transformation in the personal life. In the same way, the University has examined its strengths and weaknesses, its opportunities and areas of concern, to help it to make a clear-sighted transformation for the future. These key elements, as identified by the Strategic Planning Team, can be found in Appendix II.

Prominent Strengths
- The university has a solid core identity based on a scholarly, engaged community dedicated to student growth as a “whole person” through creative pursuits and intellectual inquiry.
- Our diverse student body enriches our campus community.
- Loyola’s Jesuit brand stands for high-quality academic programs that, through a collaborative learning environment, transform our students both intellectually and spiritually.
- Our location in New Orleans, LA, provides fertile ground for students to experience their education through collaboration with the arts, professional, non-profit, and scientific communities.
- Loyola's campus is compact and yet architecturally beautiful.
- A strong sense of community influenced by Jesuit values, a tremendously diverse student body, and a location in the destination city of New Orleans are all points of differentiation. (Lawlor Group)
- The location of New Orleans and its attractiveness. (Lawlor Group)
- An involved, diverse campus community located in a vibrant city. (Lawlor Group)
- Undergraduates see Loyola as having a supportive faculty and staff. (Lawlor Group)

Prominent Weaknesses
Planning and Implementation
- Loyola University needs to improve its strategic planning process and work on vertically aligned implementation throughout the university.
• Strategically, Loyola is “stuck in the middle” between broad-based competitors (like LSU) and lower-cost competitors (like UNO) presently without a sustainable niche as a university and within some colleges.

• Loyola’s internal planning and administrative approval process take too much time resulting in a loss of nimbleness in responding to environmental changes.

• Loyola tends to plan and operate in a “silo” fashion which inhibits organizational (horizontal) initiatives and programs.

• Loyola lacks agreement on its academic mission/standards.

**Brand Identity and Marketing**

• The Loyola brand still remains fuzzy in the minds of some internal and external constituencies, resulting in a muddled image.

• The value proposition of a Loyola education—“What do I get for my money?”—is not being well communicated to perspective students. There are varying opinions on campus as to whether Loyola does indeed have a strong value proposition.

• Marketing Loyola has traditionally not been a top priority for our university and has thus been under-resourced.

• Not sure it has anything that sets it apart other than the City of New Orleans, although it still suffers under Tulane’s reputation and the image of it being the ‘other school.’” (Lawlor Group)

**Infrastructure and Data**

• The university is currently unable to properly resource the informational technology needs of the campus (telephone, computer, wireless) to remain current and competitive with other educational institutions.

• Institutional databases are not strong enough to support decision-making across the university.

**Faculty and Staff**

• The morale of the faculty and staff has been negatively influenced by the budget shortfall of 2013-14.

• The diversity in faculty and staff does not approach the diversity seen in our student population.

• Professional development resources for faculty are lacking.
Budgeting

- Loyola’s budget allocation process is not strategic in that it is not aligned to create strategic advantages with regard our “core” business. Politics, not strategic issues, prevail in resource allocation and budget-making decisions.

- The budgeting process and strategic planning process are not aligned, and they therefore operate more in isolation rather than in unison.

- Loyola remains a tuition-dependent institution, which limits its strategic and operational options.

Campus Life and Students

- There is a lack of resources to grow student life and programs.

- Top negative perceptions from stakeholders of Loyola:
  
  o Current undergraduates
    - Expensive
    - Run-down facilities and technology
    - Poor academics/programs
    - Too small
    - Construction
  
  o Faculty
    - Poor/incompetent administration
    - Expensive
    - No vision/mission/identity
    - Financial issues
    - Poor academics/programs
  
  o Staff
    - Expensive
    - Poor/incompetent administration
    - Financial issues
    - Run-down facilities and technology
    - Lack of leadership
  
  o Alumni
    - Expensive
    - Poor academics/programs
    - Too small
    - Run-down facilities and technology
    - Not well known

(The Lawlor Group)
• Negative perceptions of campus:

The following perceptions were identified in a study conducted by The Lawlor Group:

- Robust access to technology. (Lawlor Group)
- Lack of promoting school spirit. (Lawlor Group)
- Career advising is weak. (Lawlor Group)
- Intercollegiate athletics. (Lawlor Group)
- Connecting work-ready graduates with potential employers. (Lawlor Group)
- Lack of providing a good value for the investment. (Lawlor Group)
- Graduating students on time, in 4 years. (Lawlor Group)

Programs

- Effective interdisciplinary programs on campus (e.g., business-music) are lacking.
- Loyola lacks clarity on the strategic priority of its adult and graduate programs.
- Limited variety of course offerings. (Source: The Lawlor Group)

Prominent Opportunities

Location

- The New Orleans region presents opportunities for “hands-on” experience-based learning.
- The “rebirth” of the city and its entrepreneurial spirit has created an exciting climate in which to live and learn.
- Loyola is in the south, a growth region (Digest of Education Statistics, 2012).
- 55% of all 2013-14 public high school graduates reside in 10 states, three important states for Loyola are:
  - Florida 26%
  - Texas 42%
  - California 55%
  (NCES, Projections of Education Statistics to 2021)
Values, Spirituality, and Experiences

- Employers are recognizing the value of graduates who believe ethically and think critically.

- Today’s students want to learn by experiencing.

- The national trend of undergraduate students participating in research is within the grasp of smaller universities like Loyola.

Educational Environment

- The education market is becoming increasingly competitive and segmented. Schools that do not define their value proposition and brand promise will become stuck in the middle without a primary attractor to potential students and faculty.

- Certain segments of the undergraduate student population are seeking the benefits offered by private or religious-affiliated colleges and universities (e.g., Muslim and Hispanic women).

- 77% of high school seniors and college students say that money played an important role in where they decided to apply to/attend college. (Citi/Seventeen, 2013)

- 33% said money was the single most important factor. (Citi/Seventeen, 2013)

Marketing, Branding, and Communication

- Increased competition for students has raised the ante with respect to marketing efforts. No longer will the mantra “build it and they will come” suffice to remain a viable alternative to those looking for a higher educational experience.

- There is a growing importance within universities for both internal and external communications that reinforce the value proposition and brand identity of individual institutions.

Facilities and Infrastructure

- Colleges and universities are increasingly using their facilities (residence halls, science labs, and recreational spaces) to woo new students.

- Likewise, students are demanding cutting-edge technology on campus to serve both their personal and professional needs.

- Campus beauty and modernization of facilities remain important in making positive impressions to a number of relevant stakeholder groups.
Prominent Threats

Financial

- Competition for new students will increasingly emphasize the perceived value of different educational alternatives.

- At present, Loyola University New Orleans is living under a cloud of suspicion about the long-term viability of the institution. Continued enrollment shortfalls could threaten Loyola and potentially bring about its decline.

- Median cost of tuition is just over $11,000/year:
  - Tulane $46,930
  - Loyola $36,920
  - LSU $7,873
  (College Board, "Trends in College Pricing 2013")

- 61% of Americans think college tuition should be no more than $20,000. (Gallup, 2013)

- 68% of four-year college students believe loan debt is a "major problem" for young people. (Harvard Institute of Politics, 2013)

Educational Landscape

- The educational landscapes are becoming more dynamic due to increased competition from traditional institution and distance-learning alternatives.

- Families and their college-aged students are questioning the added value provided by private colleges and universities.

Human Capital

- As universities tighten their “belts,” different roles will be asked of faculty and staff. For faculty, these roles are not necessarily consistent with traditional reward structures valued by the academy.

- Increasingly, students are looking for campuses that display diversity of faculty and staff.
GAP Analysis

One of the steps along the path to improvement includes addressing differences between students’ perceptions and expectations and the actual performance of the university. The Strategic Planning Team identified these areas for improvement by using a GAP analysis, which is based on a conceptual model of service quality. The following tables outline these gaps and the ways that the University plans to close them. More diagrams of the GAP Analysis can be found in Appendix III.
GAP 1  
**Student expectations and Loyola’s perception of students’ expectations**

The table below shows the gap in service quality based on differences between student expectations and Loyola's perception of those expectations. Based on the Gap 1 Analysis, Loyola will have to direct more effort toward experiential learning and devote more resources to career development and career placement. The university will also have to be proactive in managing the size and shape of incoming classes with attention to strong students ready to accept the task of Loyola’s challenging education environment. In addition, Loyola’s top administration will have to take a more engaged role in leading and communicating the value of attending a Jesuit/Catholic university.

<table>
<thead>
<tr>
<th>GAP 1 Themes</th>
<th>To Close GAP 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Career</td>
<td>1. Career</td>
</tr>
<tr>
<td>a. Students think in the short-term and about a career after graduation.</td>
<td>a. Loyola needs to direct more effort toward experiential-based learning and move resources into career development and placement.</td>
</tr>
<tr>
<td>2. Class Size and Shape</td>
<td>2. Class Size and Shape</td>
</tr>
<tr>
<td>a. Loyola needs to manage the shape and distribution of incoming classes.</td>
<td>a. Attention to right-sizing Loyola and the shape of the distribution must be managed over the next five years—add more top students and admit fewer weaker students.</td>
</tr>
<tr>
<td>a. Have we translated our mission and aligned it (horizontally and vertically) so that it is perceived as a value addition by our stakeholders (faculty, staff, students, externals, parents)?</td>
<td>a. Communicate to parents and students that the Loyola experience emphasizes the professional and social service and sacred engagement.</td>
</tr>
<tr>
<td>4. Leadership</td>
<td>4. Leadership</td>
</tr>
<tr>
<td>a. Board of trustees/Administration see the reason for attending Loyola (Jesuit/Catholic) differently than students, faculty, and staff.</td>
<td>a. There needs to be more engaged leadership at the university and college levels (vertical alignment).</td>
</tr>
</tbody>
</table>
GAP 2  Leadership’s perception of students’ wants and expectations and the metrics that Loyola measures.

Gap 2 addresses the issues of aligning Loyola’s metrics with the student body’s wants and expectations of the university and their educational experience. To address Gap 2, Loyola will have to create a metric system of measures to track student experiences and progress toward meeting both personal and professional expectations.

<table>
<thead>
<tr>
<th>GAP 2 Themes</th>
<th>To Close GAP 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Measures</td>
<td>1. Measures</td>
</tr>
<tr>
<td>a. Loyola has not determined the primary criteria students use in making the college decision.</td>
<td>a. Create professional/career databases for each college and track student career progress. These measurements must align with the university’s strategic plan.</td>
</tr>
<tr>
<td>b. No family of measures is tied to critical criteria for recruitment and success at Loyola and beyond.</td>
<td>b. Loyola needs to design a family of measures with feedback loops to faculty.</td>
</tr>
<tr>
<td>2. Funding Priorities</td>
<td>2. Funding Priorities</td>
</tr>
<tr>
<td>a. Funding priorities do not match faculty and student needs.</td>
<td>a. With better databases tailored to our needs will come the ability to match and measure progress of meeting or exceeding student expectations</td>
</tr>
</tbody>
</table>
GAP 3 What the University believes is important and the student experience actually delivered.

To close the third gap in the service quality model, Loyola will have to assess the quality of some courses within the university. In addition, various colleges will use the CoB Portfolio programs as a guide to create such a program to meet the particular needs of their program. There will be a system of metrics within Loyola which are aligned from the top to the bottom of the university. The planning process at Loyola will feature vertical alignment so that a family of measures consistently reinforces the four overarching strategies contained in Loyola’s Strategic Plan 2014-2020.

<table>
<thead>
<tr>
<th>GAP 3 Themes</th>
<th>To Close GAP 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Student Life</strong></td>
<td>1. Student Life</td>
</tr>
<tr>
<td>a. We fall short of providing a high-quality classroom experience in some quadrants of the faculty.</td>
<td>a. Loyola needs serious assessment practices on campus to make us a better institution.</td>
</tr>
<tr>
<td>b. Life after college for Loyola graduates is not well-managed by the University.</td>
<td>b. Adopt the CoB Portfolio Program to meet the needs of various academic units across campus.</td>
</tr>
<tr>
<td><strong>2. Accountability</strong></td>
<td>2. Accountability</td>
</tr>
<tr>
<td>a. Accountability is difficult due to the lack of clarity in our goals.</td>
<td>a. Every unit on campus will have assignment plans aligned with the University’s family of measures (metrics).</td>
</tr>
<tr>
<td><strong>3. Planning Horizon</strong></td>
<td>3. Planning Horizon</td>
</tr>
<tr>
<td>a. Loyola spends too much effort and too many resources in reacting to pressing issues and not enough to core academic mission.</td>
<td>a. Loyola will establish a discipline of planning (supported by a family of metrics) that leads to proactivity to focus on and finish strategic goods stemming from “Our Main Thing” and the published university strategic plan 2014-2020.</td>
</tr>
</tbody>
</table>
GAP 4 addresses the promise of a Jesuit/Catholic education as being one that considers developing the whole person within rigorous degree programs. Therefore, the university will have to emphasize and expand our honors program. To do so, a refined marketing program will be developed to attract top flight students who realize that our promise of a Loyola experience exceeds their personal expectations. Post-enrollment, during the first-year experience, our students will come to thoroughly understand the value of a liberal arts education as a foundation to guide career decisions consistent with Jesuit ideals. Mentoring programs will be developed within each college utilizing external mentors to help students understand practical career paths and requirements for success in various fields.

### GAP 4 Themes

<table>
<thead>
<tr>
<th>Pre-Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loyola states that we are rigorous and cross-disciplinary.</td>
</tr>
</tbody>
</table>

| Incoming students are told of a blended education—not a blend of liberal arts with professional education. |

| There is a huge gap in intentionality resulting in Loyola students being all over the map with regard to expectations. |

<table>
<thead>
<tr>
<th>Post-Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not enough focus on explaining the value of a liberal arts education founded on Jesuit ideals.</td>
</tr>
</tbody>
</table>

| Students do not experience a |

### To Close GAP 4

<table>
<thead>
<tr>
<th>Pre-Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a larger honors program to meet the needs of our newly shaped incoming classes (more STAR students, fewer remedial ones)</td>
</tr>
</tbody>
</table>

| College Deans will work to create vehicles which create more well-rounded students (liberal arts and professional) with more career guidance in each college. |

| Through refined target marketing and a revised marketing/branding plan, Loyola will set expectations of prospective students with a revised communication plan. Hence, Loyola will be better able to attract, retain, and place its students in careers of their choice. |

<table>
<thead>
<tr>
<th>Post-Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>As part of the first-year experience, students will understand the balance between Jesuit ideals and choosing a career.</td>
</tr>
</tbody>
</table>

| Each college will develop a |

| |
| |
| Loyola that is in keeping with the University's mission, curriculum, and activities of Student Affairs | mentorship program (of external mentors) who will help students adapt to Loyola and begin career counseling. Faculty and administration will better explain career paths for various majors in respective colleges. |
GAP 5 Expected experience and the students’ perceptions of what Loyola Provides.

The fifth GAP is concerned with meeting or exceeding student expectations. Students come to college expecting value for their tuition dollars. A major part of these expectations is in being prepared to make a career choice and find suitable employment. Thus Loyola will have to invest heavily in those services which directly affect Loyola graduates career preparation and opportunities for employment. To do so, Loyola must remain competitive in the areas of technology, internship opportunities in New Orleans and elsewhere, and both curricular and extracurricular programs.

To accomplish this plan, and close the five GAPS, a well-crafted and data-driven strategic plan must be vertically deployed to colleges, departments, and faculty members so as to focus and finish goals within an environment of accountability to agreed-upon metrics.

<table>
<thead>
<tr>
<th>GAP 5 Themes</th>
<th>To Close GAP 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Career Expectations  a. Students expect that going to college will lead to career and financial security but leave with no or little job skills.</td>
<td>1. Career Expectations  a. Colleges will work with the Career Development Center to better prepare students with regard to career choice and job-finding skills.</td>
</tr>
<tr>
<td>2. Campus Offerings  a. Students expect a high-tech campus, contemporary residence halls, a campus of engaged learning with New Orleans a living learning laboratory. Likewise, Loyola will offer a breadth of programs attractive to a variety of student interests—curricular or extracurricular.</td>
<td>2. Campus Offerings  a. These issues will be resolved in the plan.</td>
</tr>
<tr>
<td>3. Rigorous Classes  a. There is a question as to the overall rigor found in our classes campus-wide. Increased effort will help students get more out of their Loyola experience. Part of the language on campus is to describe the experience of Loyola as “Loyola High School: Pay your fees and get your C’s.”</td>
<td>3. Rigorous Classes  a. A well-crafted and data-driven strategic plan that is vertically deployed to colleges, departments, and faculty members will allow the administration to focus on and finish the plan and be accountable to agreed-upon metrics.</td>
</tr>
</tbody>
</table>
IMPLEMENTING THE PLAN

Funding the Plan

We will fund the plan in three ways:

1. Through existing budgets and reallocation of current resources
2. Revenue growth from increased enrollment as the result of new programs
3. External fundraising

The estimated funding and assessment metrics for the high-priority action plans for 2013-2014 are provided below. An integrated financial and facilities plan will follow in the implementation phase of the plan, and the appropriate University and Board committees will monitor that implementation in the years to come.

Measuring Progress

The Strategic Planning Team has overseen the development of 21 action plans. A master schedule was created to chart the phasing of each action plan. See the Gantt chart below.
While the Strategic Planning Team recognizes all of the action plans that will begin implementation in academic year 2014-2015, it also recognizes that there are five action plans that require more immediate attention. Following are the high priority action plans with assessment metrics and their cost estimates.

**Assessment Metrics: Strategic Plan, AY 2014-15**

- **Action Plan 1A: Experiential Learning (Cost for AY 14-15: $75,000)**
  - Delivery of PR proposal by December 19, 2014
  - Delivery of creative proposal by May 29, 2015
  - Delivery of marketing materials by July 31, 2015

- **Action Plan 1C: Academic Support Services (Cost for AY 14-15: $300,000)**
  - Delivery of literature review & site visit rubric by October 31, 2014
  - Delivery of blueprints for renovations by January 30, 2015
  - Delivery of recommendations based on site visits by March 1, 2015
  - Renovations completed by July 31, 2015

- **Action Plan 2A: Career Services (Cost for AY 14-15: $25,000)**
  - Delivery of final report based on site visits by May 14, 2015

- **Action Plan 2B: Collaborative Advising (Cost for AY 14-15: $12,500)**
  - Delivery of literature review & site visit rubric by December 19, 2014
  - Delivery of recommendations based on site visits by May 29, 2015

- **Action Plan 3D: New Programs (Cost for AY 14-15: Cost: $150,000)**
  - Delivery of new program proposals to UC&CC and SCAP by October 3, 2014
  - Delivery of new program proposals to Board of Trustees by October 9, 2014
  - Delivery of business plan for new programs by May 14, 2015
  - Hire new faculty by May 29, 2015

- **Total estimated costs for high priorities in AY 14-15: $562,500**
Appendix I: Environmental Analysis

I. Economic Environment
   • Universities, public and private, are faced with economic pressures that will require that they become increasingly more economically efficient and educationally effective.
   • Universities are looking for new sources of revenue to offset rising costs of operation.
   • A shrinking base of college age students will pressure universities to achieve economically viable freshman classes.
   • The cost of higher education has risen faster than inflation for several years, bringing about criticism from the media and other stakeholder groups.
   • Only 53% of American adults agree that in order to get ahead in life these days it’s necessary to earn a college degree. (YouGov, 2013)

II. Educational Environment
   • The increasing economic pressure on higher educational institutions has spurred the need to prove the value of an educational experience.
   • In the 2012 CIRP survey of 200,000 freshmen, 67% said economics influenced which schools they attended.
   • The US Census Bureau indicates that more women are holding college degrees than men and that the average student population of US universities is 60% women.
   • 15% of undergraduates will attend a private, 4 year college (NCES, Digest of Education Statistics, 2012)
   • 82% of first-year college students who graduated from high school within the past 12 months attend an institution in their home state. (NCES, Digest of Education Statistics, 2012)
   • 54% of all first-time full-time students are women. (NCES, Digest of Education Statistics, 2012)
   • Non-traditional-age students are growing at a faster rate. (NCES, Projections of Education Statistics to 2021, 2013)
   • 68% of the U.S. population age 25 and older does not have a bachelor’s degree. (US Census Bureau, Current Population Survey, 2013)
   • 23.6% of traditional-age students who began in 2006 and completed a degree did so at an institution other than the one where they started. (Nat’l Student Clearinghouse Research Center, 2013)
   • 33% of all college students who began in 2006 transferred at least once within five years. (Nat’l Student Clearinghouse Research Center, 2013)
   • Those under age 25 currently make up 60% of all college students, but that will drop to 57% by 2021. (NCES, Projections of Education Statistics to 2021, 2013)
• Career preparation is the top reason to attend college.
  o To be able to get a better job, 83%
  o To get training for a specific career, 79%
  o To be able to make more money, 74%
    (CIRP, “The American Freshman 2012”)
• 85% of consumers who go online say “recommendations from people I know” are likely to cause them to take action, compared to only 69% who say information on a branded website would prompt them. (Nielsen, 2013)

III. Student Experiences
• Over one-quarter of high school students report feeling overwhelmed during their senior year in high school (30.4% in 2012 vs. 28.5% in 2013).
• More than twice as many incoming female students (40.5%) report feeling overwhelmed than first-year male students (18.3%, 2012 CIRP).
• The 2012 CIRP concludes that the findings support “the need for colleges to provide and promote resources that support students’ health and wellness as they arrive on campus.”
• Students are looking for “experiences” during college which influence their college choice. Engagement opportunities, co-curricular and extracurricular, are important in college choice. Community engagement through service learning and other “hands on” experiences are particularly meaningful to college age students. Student Affairs activities (athletics, recreational facilities, residential living concerns, and common gathering areas and services) are important in attracting and retaining students.
• Most students choose to attend a college within 100 miles from home. (CIRP, “The American Freshman 2012”)
• Among ACT test-takers in the high school class of 2012 who went on to enroll in college, the median distance from their hometown to their college was 51 miles. (ACT, 2012)

IV. Student Financial Issues
• The rising tuition and fee costs for higher education are shown in a College Board study which reports that for 2012-13, the average total charges for an in-state public university were almost $18,000 and $31,000 for out of state students.
• For the same year, students at private, non-profit colleges paid on average $39,500 (College Board).
• For 2010-11, 57% of public four-year college students left school with an average debt of $23,800 while 67% of private non-profit school graduates averaged $29,400 in debt.
• However, the cost of colleges shifting from institutional discounts to students and families only creates an additional burden for those paying for an education.
V. Student Needs/Expectations

- In the CIRP national study of 200,000 freshmen reported that:
  1. 88% of freshman say their reason to go to college is to get a good job,
  2. 75% to be able to make more money.
  3. 40% of first generation freshmen indicate they had “very distracting and troublesome” financial problems. (Number held steady past six years.)

- In a freshman survey (2013) of Loyola’s College of Business freshmen, the study reported that:
  1. 52% say financial aid package was better than that offered by other schools
  2. 13% said the New Orleans Location was most important in their decision to attend Loyola
  3. 12% said the campus atmosphere was most important as a deciding factor
  4. 2% said they wanted to attend a catholic university and 1% wanted to attend a Jesuit university

- In a university-wide survey of first-time, full-time students at Loyola, 471 respondents (75% response rate) reported their reasons for applying and enrolling at the university. The weather in New Orleans and academic programs were the top two reasons for applying to Loyola. However, financial reasons were, by far, the top factor in enrolling at Loyola.
VI. Employment Opportunities
(Results are mostly taken from the report *Recovery: Job Growth and Educational Requirements through 2020* by Georgetown University’s Institute for Public Policy.)

- By 2020, 65% of all jobs in the economy will require post-secondary education and training beyond high school.
- There will be 55 million job openings in the economy through 2020: 24 million openings from newly created jobs and 31 million openings due to baby boomer retirements.
- Skills most valued in the economy:
• Abilities most valued (communication and analysis):

![Diagram showing intensity of skills use across all occupations]

VII. Employer Expectations
- A special report from the *Chronicle of Higher Education*, March 2013, reported the following:
  o Employers value four-year degrees more than ever.
  o But one-third suggest that colleges do a poor job of preparing students for today’s workforce.
  o 53% say it is difficult or very difficult to find qualified graduates.
  o The report cites one employer as saying recent graduates lack fundamental abilities such as how to analyze large amounts of data or construct a cogent argument. “It’s not a matter of technical skill,” he says, "but of knowing how to think.”
  o Most employers in the survey say colleges are not adequately preparing students in written and oral communication, decision-making, and analytical and research skills.
  o A strong liberal arts education, producing well-rounded individuals, is still highly prized, but the graduate needs to be versed in fundamental skills that include communication (especially the ability to write and to speak), basic technical skills for the digital environment, the ability to discern and to think – to solve problems and to create new opportunities.
- 62% of Americans say the higher education system is currently doing only a fair to poor job of preparing college graduates. (Northeastern University, 2013)
Appendix II: SWOT Analysis

STRENGTHS

- For over 100 years, Loyola’s university community has been transforming students in keeping with its Jesuit/Catholic identity.

- The university has a solid core identity based on a scholarly, engaged community dedicated to student growth as a “whole person” through creative pursuits and intellectual inquiry.

- Our diverse student body enriches our campus community.

- Loyola’s Jesuit brand stands for high-quality academic programs that, through a collaborative learning environment, transform our students both intellectually and spiritually.

- The university is recognized as a place that prides itself on concern for the individual, student safety, faculty accessibility and for being a humane place to work.

- Loyola University New Orleans is consistently ranked as a “best buy” among competitive universities. We were named “Great Schools Great Prices” by US News and World Reports (Ranked 7 in 2014 edition); named a 2012 Best Value Private College by Kiplinger’s Personal Finance; and named a Best Buy in the Fiske Guide to Colleges 2012.

- The university enjoys a position of relative economic stability due to its healthy endowment of $200+ million dollars.

- Loyola is being recognized for its efforts in fostering interdisciplinary (signature) programs across its colleges, including the university honors program.

- Student Affairs, through its staff and programming, has enhanced the quality of student life on campus.

- Our location in New Orleans, LA, provides fertile ground for students to experience their education through collaboration with the arts, professional, non-profit, and scientific communities.

- The Monroe Library offers services of the highest quality to our university community.
• Loyola’s campus is compact and yet architecturally beautiful.

• The Loyola community is committed to correcting the shortfall in enrollment and ensuring the future success of the University. (Lawlor Group)

• The sense of commitment to Loyola and its students is palpable among the faculty and staff. Faculty and staff are willing to do their part to help recruit new students, as well as to educate and graduate them. (Lawlor Group)

• A strong sense of community influenced by Jesuit values, a tremendously diverse student body, and a location in the destination city of New Orleans are all points of differentiation. (Lawlor Group)

• The location of New Orleans and its attractiveness. (Lawlor Group)

• An involved, diverse campus community located in a vibrant city. (Lawlor Group)

• Faculty and student accomplishments. (Lawlor Group)

• Loyola provides opportunities for service/engagement. (Lawlor Group)

• Study abroad programs offer a number of opportunities. (Lawlor Group)

• Development of communication and critical thinking skills. (Lawlor Group)

• Loyola’s emphasis on social practice principles. (Lawlor Group)

• Undergraduates see Loyola as having a supportive faculty and staff. (Lawlor Group)

• Small class sizes and personalized education. (Lawlor Group)

• Emphasis on social justice and civic responsibility. (Lawlor Group)

WEAKNESSES

Planning and Implementation

• Loyola University needs to improve its strategic planning process and work on vertically aligned implementation throughout the university.

• Across the university, external communication and internal horizontal coordination are lacking.
• Strategically, Loyola is “stuck in the middle” between broad-based competitors (like LSU) and lower-cost competitors (like UNO) presently without a sustainable niche as a university and within some colleges.

• Loyola’s internal planning and administrative approval process take too much time resulting in a loss of nimbleness in responding to environmental changes.

• Loyola tends to plan and operate in a “silo” fashion which inhibits organizational (horizontal) initiatives and programs.

• Loyola lacks agreement on its academic mission/standards.

**Brand Identity and Marketing**

• The Loyola brand still remains fuzzy in the minds of some internal and external constituencies, resulting in a muddled image.

• How we see ourselves and how others see us are not aligned. A misalignment also exists between our mission and our brand.

• The value proposition of a Loyola education—“What do I get for my money?”—is not being well communicated to perspective students. There are varying opinions on campus as to whether Loyola does indeed have a strong value proposition.

• Loyola has not adequately translated the balance of a liberal/comprehensive education into language that students appreciate.

• Loyola suffers from a misconception of Catholic as it relates to prospective students.

• Marketing Loyola has traditionally not been a top priority for our university and has thus been under-resourced.

• Not sure it has anything that sets it apart other than the City of New Orleans, although it still suffers under Tulane’s reputation and the image of it being the ‘other school.’” (Lawlor Group)
Infrastructure and Data

- Some parts of the campus reflect the issue of deferred maintenance, which is estimated presently to cost $13 million.

- The university is currently unable to properly resource the informational technology needs of the campus (telephone, computer, wireless) to remain current and competitive with other educational institutions.

- Institutional databases are not strong enough to support decision-making across the university.

- The adequacy and upkeep of university facilities can be improved.

Faculty and Staff

- The morale of the faculty and staff has been negatively influenced by the budget shortfall of 2013-14.

- The university has a void of mid-career faculty, resulting in less mentoring for junior faculty campus wide.

- The diversity in faculty and staff does not approach the diversity seen in our student population.

- Professional development resources for faculty are lacking.

Budgeting

- Consistent budget shortfalls (year to year) potentially threaten the viability of the university.

- Loyola's budget allocation process is not strategic in that it is not aligned to create strategic advantages with regard our “core” business. Politics, not strategic issues, prevail in resource allocation and budget-making decisions.

- The budgeting process and strategic planning process are not aligned, and they therefore operate more in isolation rather than in unison.

- Loyola remains a tuition-dependent institution, which limits its strategic and operational options.
Campus Life and Students

- There is a lack of resources to grow student life and programs.
- The campus is not completely residential.
- Top negative perceptions from stakeholders of Loyola:
  - Current undergraduates
    - Expensive
    - Run-down facilities and technology
    - Poor academics/programs
    - Too small
    - Construction
  - Faculty
    - Poor/incompetent administration
    - Expensive
    - No vision/mission/identity
    - Financial issues
    - Poor academics/programs
  - Staff
    - Expensive
    - Poor/incompetent administration
    - Financial issues
    - Run-down facilities and technology
    - Lack of leadership
  - Alumni
    - Expensive
    - Poor academics/programs
    - Too small
    - Run-down facilities and technology
    - Not well known
(The Lawlor Group)

- Negative perceptions of campus:
  - Robust access to technology. (Lawlor Group)
  - Lack of promoting school spirit. (Lawlor Group)
  - Career advising is weak. (Lawlor Group)
  - Intercollegiate athletics. (Lawlor Group)
  - Connecting work-ready graduates with potential employers. (Lawlor Group)
Lack of providing a good value for the investment. (Lawlor Group)

Graduating students on time, in 4 years. (Lawlor Group)

Programs

- Effective interdisciplinary programs on campus (e.g., business-music) are lacking.
- Loyola lacks clarity on the strategic priority of its adult and graduate programs.
- There is a relative lack of coherence between academic and co-curricular programs.
- Limited variety of course offerings. (Lawlor Group)

Perceptual Study (Lawler Group)

- Table 1 shows the findings of a Loyola vis-à-vis competitors as perceived by current undergraduates
- Table 2 presents the findings for prospective students
- Table 3 shows the findings of a Loyola vis-à-vis competitors as perceived by prospective parents.
FINDINGS: PERCEPTIONS OF LOYOLA VIS-À-VIS COMPETITORS (PROSPECTIVE STUDENTS)

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Perceptions of Loyola
Top 2 Box

Prospective Students Aware of Loyola n=389

- Friendly, welcoming atmosphere: 42%
- Overall campus appearance and facilities: 42%
- Overall reputation: 40%
- Desirable campus location: 39%
- Active student life: 38%
- Variety of academic majors or programs: 36%
- Rigorous academics: 34%
- Diverse campus community: 34%
- Four-year graduation rate: 32%
- Scholarship opportunities: 31%
- Service opportunities (volunteerism): 31%
- Successful graduates: 31%
- Small size (classes, student body): 30%
- Residential campus: 30%
- Quality of the faculty: 29%
- Freshman class profile: 29%
- Physically safe campus: 28%
- Hands-on learning: 26%
- Job placement rate: 24%
- Civic engagement: 22%
- Affordability: 22%
- Competitive athletics: 19%
- Average debt load of graduates: 17%

★ = in-state significantly higher than out-of-state students
### PERCEPTIONS OF LOYOLA VIS-À-VIS COMPETITORS (PROSPECTIVE PARENTS)

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#### Perceptions of Loyola

**Top 2 Box**

<table>
<thead>
<tr>
<th>Perception</th>
<th>In-State</th>
<th>Out-State</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall reputation</strong></td>
<td>44%</td>
<td>39%</td>
</tr>
<tr>
<td><strong>Rigorous academics</strong></td>
<td>38%</td>
<td>39%</td>
</tr>
<tr>
<td><strong>Overall campus appearance and facilities</strong></td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Variety of academic majors or programs</strong></td>
<td>37%</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Successful graduates</strong></td>
<td>37%</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Diverse campus community</strong></td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td><strong>Quality of the faculty</strong></td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td><strong>Friendly, welcoming atmosphere</strong></td>
<td>34%</td>
<td>33%</td>
</tr>
<tr>
<td><strong>Service opportunities (volunteerism)</strong></td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td><strong>Desirable campus location</strong></td>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td><strong>Active student life</strong></td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td><strong>Four-year graduation rate</strong></td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td><strong>Small size (classes, student body)</strong></td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td><strong>Civic engagement</strong></td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td><strong>Residential campus</strong></td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td><strong>Hands-on learning</strong></td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Physically safe campus</strong></td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Freshman class profile</strong></td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Scholarship opportunities</strong></td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td><strong>Job placement rate</strong></td>
<td>21%</td>
<td>19%</td>
</tr>
<tr>
<td><strong>Affordability</strong></td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>Average debt load of graduates</strong></td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Competitive athletics</strong></td>
<td>14%</td>
<td>14%</td>
</tr>
</tbody>
</table>

* = in-state significantly higher than out-of-state students
OPPORTUNITIES

Location

- The New Orleans region presents opportunities for “hands-on” experience-based learning.
- The warm climate and diversity within the city are attractive to international students, particularly those from Latin America.
- The “rebirth” of the city and its entrepreneurial spirit has created an exciting climate in which to live and learn.
- The economic vitality of the Greater Gulf Region and the Port of New Orleans are natural attractors to New Orleans and its educational opportunities.
- Loyola is in the south, a growth region (Digest of Education Statistics, 2012).
- Through 2019, the number of high school graduates will be flat or decrease in every region except the south (WICHE, "Knocking at the College Door: Projections of High School Graduates, 2012).
- 55% of all 2013-14 public high school graduates reside in 10 states, three important states for Loyola are:
  - Florida 26%
  - Texas 42%
  - California 55%
  (NCES, Projections of Education Statistics to 2021)

Values, Spirituality, and Experiences

- Employers are recognizing the value of graduates who believe ethically and think critically.
- A growing segment of the population are spiritually hungry and desire meaningful work in their lives.
- Today’s students want to learn by experiencing.
- The national trend of undergraduate students participating in research is within the grasp of smaller universities like Loyola.
A Jesuit Pope has the potential to impact the importance of a Jesuit/Catholic education.

**Educational Environment**

- The cost pressure on universities to manage tuition rates opens the opportunity for senior leaders and faculty to reflect on reinventing their institutions to prepare proactively for the future – to create a preferred future for their organization where high-quality education is offered at reasonable costs.

- Expectations about the nature of higher education are changing, which offers opportunities for nimble universities to capitalize on the advantage of being early to respond to changing needs in the marketplace.

- The education market is becoming increasingly competitive and segmented. Schools that do not define their value proposition and brand promise will become stuck in the middle without a primary attractor to potential students and faculty.

- Certain segments of the undergraduate student population are seeking the benefits offered by private or religious-affiliated colleges and universities (e.g., Muslim and Hispanic women).

- 77% of high school seniors and college students say that money played an important role in where they decided to apply to/attend college. (Citi/Seventeen, 2013)

- 33% said money was the single most important factor. (Citi/Seventeen, 2013)

- While 84% of first-year students believe they will graduate in four years, the schools they attend only graduate 41% of their students in four years on average. (CIRP, “The American Freshman 2012”); and 52% do so at private schools (NCES, Digest of Education Statistics, 2012)

**Marketing, Branding, and Communication**

- Increased competition for students has raised the ante with respect to marketing efforts. No longer will the mantra “build it and they will come” suffice to remain a viable alternative to those looking for a higher educational experience.

- There is a growing importance within universities for both internal and external communications that reinforce the value proposition and brand identity of individual institutions.
• The Association of Jesuit Colleges and Universities offers the potential to leverage the generic Jesuit “brand” and provide benefits to its 28 member colleges and universities.

Facilities and Infrastructure

• Colleges and universities are increasingly using their facilities (residence halls, science labs, and recreational spaces) to woo new students.

• Likewise, students are demanding cutting-edge technology on campus to serve both their personal and professional needs.

• Campus beauty and modernization of facilities remain important in making positive impressions to a number of relevant stakeholder groups.

• In the present economic environment, both for-profit and not-for-profit organizations are realigning to higher quality services and products.
THREATS

Financial

- The financial environment will continue to put resource constraints on educational institutions, resulting in a lessened ability to find new initiatives.

- Competition for new students will increasingly emphasize the perceived value of different educational alternatives.

- At present, Loyola University New Orleans is living under a cloud of suspicion about the long-term viability of the institution. Continued enrollment shortfalls could threaten Loyola and potentially bring about its decline.

- Current financial threats could result in either over- or under-reaction to short-run pressures.

- Median cost of tuition is just over $11,000/year:
  
  - Tulane $46,930
  - Loyola $36,920
  - LSU $7,873
  
  (College Board, “Trends in College Pricing 2013”)

- 61% of Americans think college tuition should be no more than $20,000. (Gallup, 2013)

- For more than half of students at private colleges, tuition is over $31,000. (College Board, “Trends in College Pricing 2013”)

- More than 1 in 7 borrowers beginning repayment in 2010 defaulted loans within 3 years. (Federal Student Aid, 2013)

- 68% of four-year college students believe loan debt is a “major problem” for young people. (Harvard Institute of Politics, 2013)

- At a time when median HHI was $50,054, according to the U.S. Census, full-time dependent students had an average out-of-pocket cost of $18,100 at 4-year private institutions in 2011-12. (NCES, “2011-12 National Postsecondary Student Aid Study,” 2013)

- 67% of families eliminated colleges based on cost at some stage during their college search. (Sallie Mae, “How America Pays for College 2013”)
• 68% of parents of 5th-12th graders say they are “very” or “somewhat” likely to restrict the colleges their children apply to, based on tuition price. (Inside Higher Ed, 2013)

**Educational Landscape**

• The educational landscapes are becoming more dynamic due to increased competition from traditional institutions and distance-learning alternatives.

• Students are demanding more from colleges and universities while wanting to pay less of the cost.

• Families and their college-aged students are questioning the added value provided by private colleges and universities.

**Human Capital**

• Nationally, many universities and colleges are rebounding from their financial limitations of the last few years, allowing them to start rehiring younger faculty.

• As universities tighten their “belts,” different roles will be asked of faculty and staff. For faculty, these roles are not necessarily consistent with traditional reward structures valued by the academy.

• Increasingly students are looking for campuses that display diversity of faculty and staff.
One of the steps along the path to improvement includes addressing differences between students’ perceptions and expectations and the actual performance of the university. The Strategic Planning Team identified these areas for improvement by using a GAP analysis, which is based on a conceptual model of service quality. The following diagram and tables outline these gaps and the ways that the University plans to close them.

SERVICE QUALITY MODEL
SERVICE QUALITY MODEL

STUDENTS

- Personal Needs
- Word of Mouth
- Social Media
- Past Experience

Expected Education

External Communication to Students

Perceived Education

Translation of Perceptions into Quality Metrics

Leadership Perceptions of Student Expectations

Education Delivery (Pre-/Post-Contact)

GAP 1

GAP 2

GAP 3

GAP 4

GAP 5
GAP 2

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UNIVERSITY

- Leadership Perceptions of Student Expectations