



IMMACULATA
UNIVERSITY

SELF- STUDY

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Contents

List of Common Abbreviations and Acronyms	vi
List of Tables and Figures.....	vii
Tables	vii
Figures.....	vii
Executive Summary.....	1
Mission and Goals	1
Ethics and Integrity.....	1
Design and Delivery of the Student Learning Experience	1
Support of the Student Learning Experience	2
Educational Effectiveness Assessment.....	2
Planning, Resources, and Institutional Improvement	3
Governance, Leadership, and Administration	3
Introduction	4
Overview and History	4
Progress Responsive to 2019 MPPR.....	5
The Pandemic and Immaculata's Response.....	6
Looking Ahead: University Structure, Strategic Plan, and Institutional Priorities	6
Strategic Plan and Institutional Priorities.....	7
Structure of Self-Study Report	10
Chapter 1: Standard I – Mission and Goals	11
Overview	11
Centrality of Mission.....	11
Mission of Immaculata University.....	11
Core Values	12
Motto.....	12
Strategic Plan	12
Linking Mission to Decision-Making	12
Celebrating Mission	13
Mission Orientation.....	14
University Mission in Academics.....	14
Mission Beyond the Classroom.....	14
Supporting and Maintaining Mission	14
Linking Mission to Planning.....	15
Periodic Evaluation.....	16
Graduating Student Exit Surveys	16
Employee Engagement Survey 2023.....	17
Assessment of Mission and Goals.....	17
Summary	17
Key Findings.....	17
Current Initiatives.....	17
Future Directions	17
Chapter 2: Standard II – Ethics and Integrity	19
Overview	19
Institutional Ethics Compliance.....	19
Ethical Standards for All—Manuals and Catalogs	19

Honest and Open Communication	20
Respect in a Diverse Environment	21
Diversity Welcomed and Celebrated	22
Equitable Grievance Policies	23
Fair and Impartial Hiring Practices	23
Fair and Impartial Evaluation Process	24
Fair and Impartial Employee Discipline and Separation	24
Affordability and Accessibility	25
Assessing Ethics and Integrity	25
Summary	25
Key Findings	25
Current Initiatives	25
Future Directions	25
Chapter 3: Standard III – Design and Delivery of the Student Learning Experience	26
Overview	26
Faculty - Committed to Academic Excellence	26
Faculty Appointment	26
Faculty Orientation	27
Opportunities, Resources, and Support for Professional Growth and Innovation	27
Faculty Development in Teaching and Learning	28
Faculty Evaluation	28
Academic Offerings	29
Design and Development of Online Curriculum	29
Delivery Through Community Collaboration and Strategic Partnerships	30
Delivery Through Teaching and Learning Innovations and Strategies	30
Experiential Learning	31
Undergraduate Core Curriculum	32
Graduate Student Opportunities & Research	33
Assessment of the Design and Delivery of the Student Learning Experience	33
Summary	33
Key Findings	34
Current Initiatives	34
Future Directions	34
Chapter 4: Standard IV – Support of the Student Experience	35
Overview	35
Admissions	36
Expenses, Financial Aid, and Refunds	37
Transfer Credit, Credit for Prior Learning, and Advanced Placement Credits	38
Welcoming New Students	38
Student Retention Through Support	40
Supporting Students Academically	40
Supporting Students Socially	43
Supporting Students Spiritually	44
Supporting Student Wellness	44
Supporting Student Physical Health	44
Residence Life	45
Student Records & FERPA	45
Third-Party Services	45
Assessment of Support for the Student Experience	46
Summary	46

Key Findings.....	46
Current Initiatives.....	47
Future Directions	47
Chapter 5: Standard V – Educational Effectiveness Assessment.....	48
Overview.....	48
Assessment at Immaculata.....	48
Academic Assessments: Overview of Processes	49
5-Year Program Reviews	49
Departmental Student Learning Outcomes (SLO) Assessment	50
Undergraduate Liberal Arts Core Learning Outcomes Assessment.....	50
First-Year Seminar (FYS)	52
Student Course Evaluations	53
Academic Assessment in Action: Case Studies.....	53
Undergraduate Emergency Planning and Management (EPM) Program	53
PsyD Program - APA Accredited	53
Campus-wide Assessments.....	54
Departmental Annual Planning	54
Office of Institutional Research and Effectiveness (IRE).....	54
Office of Student Development and Engagement (SD&E)	55
Educational Effectiveness: Evaluating the Assessment.....	56
Summary	58
Key Findings.....	58
Current Initiatives.....	58
Future Directions	59
Chapter 6: Standard VI – Planning, Resources, and Institutional Improvement.....	60
Overview	60
Institutional Effectiveness Model	60
Institutional Effectiveness Plan	61
Strategic Plan	61
Annual Planning Process and Assessment	62
Aligning the University Budget to the Strategic Plan and Mission	62
Strategic Plan 2017-2021	62
Strategic Plan 2022-2027	64
Ensuring Long-Term Sustainability through Resource Planning and Financial Management	66
Technology Planning.....	66
Facilities Planning.....	67
Human Resources Planning	67
Financial Management and Control	68
Financial Management and Assessment.....	68
Independent Audit & Financial Viability	69
Utilizing Resources to Achieve Goals.....	70
Assessment	70
Summary	70
Key Findings.....	71
Current Initiatives.....	71
Future Directions	71
Chapter 7: Standard VII – Governance, Leadership, and Administration	72
Overview	72
Governance Structures	72

Board of Trustees.....	73
Separation of Power and Conflict of Interest.....	73
Assessment of the Board of Trustees.....	74
President - Chief Executive Officer.....	74
President's Evaluation.....	75
Role of the IHM Congregation.....	75
Administration at Immaculata.....	75
Executive Administration.....	75
Leadership Team.....	76
Evaluation of Administration.....	76
University Standing Committees and Shared Governance.....	76
Faculty Roles in Shared Governance.....	76
Functioning of University Committees and Task Forces.....	77
Student Participation in University Governance.....	78
Alumni Association and Alumni Association Board of Governors.....	78
Evaluation of University Standing Committees.....	78
Administration Engagement.....	78
Engaging with Faculty.....	79
Executive Administrative Engagement with Institutional Populations.....	79
Engaging with Students.....	80
Assessment of the Effectiveness of Governance, Leadership, and Administration.....	80
Summary.....	81
Key Findings.....	81
Current Initiatives.....	81
Future Directions.....	81
Conclusion.....	83
Mission and Goals.....	84
Ethics and Integrity.....	84
Design and Delivery of the Student Learning Experience.....	84
Support of the Student Experience.....	84
Educational Effectiveness Assessment.....	84
Planning, Resources, and Institutional Improvement.....	84
Governance, Leadership, and Administration.....	84

List of Common Abbreviations and Acronyms

Abbreviation/ Acronym	Description
AA	Academic Affairs
BOT	Board of Trustees
CAPS	College of Adult Professional Studies
CASTLE	Center for Advancement of Scholarship, Teaching and Learning Excellence
CGS/ CGSR	College of Graduate Studies (before fall 2023) College of Graduate Studies and Research (fall 2023)
CUS	College of Undergraduate Studies
CNHP	College of Nursing and Health Professions
CSI	College Student Inventory
C&I	(Office of) Curriculum & Instruction
EOYA	End-of-Year Assessment (Annual Plan)
FTE	Full Time Equivalent(cy)
FYS	First-Year Seminar
HR	Human Resources
IEP	Institutional Effectiveness Plan
IHM	(Sisters, Servants of the) Immaculate Heart of Mary
IRE	(Office of) Institutional Research and Effectiveness
IP	Institutional Priority(ies)
IU	Immaculata University
IUPM	Immaculata University Policy Manual
LMS	Learning Management System
LSS	Learning Support Services
MyIU	Immaculata Portal
NSO	New Student Orientation
OAA	Office of Academic Assessment
OCPD	Office of Career and Professional Development
OER	Open Educational Resources
OL	(Office of) Online Learning
OSM	One Shell Model
OTS	Office of Technology Services
PDE	Pennsylvania Department of Education
SDE (SD&E)	Student Development and Engagement
SLO	Student Learning Outcomes
SP	Strategic Plan
SSIU	Self-Service IU (access to administrative systems)
UCAC	Undergraduate Core Assessment Committee
VPAA	Vice President for Academic Affairs
VPMM	Vice President for Mission and Ministry

List of Tables and Figures

Tables

Number	Description
I.1	Full-time Equivalent (FTE) 2014-2023
I.2	Immaculata University College Academic Structure Effective Fall 2023
I.3	Alignment of University Mission with Institutional Priorities
I.4	Alignment of Strategic Plan Goals with Institutional Priorities
I.5	Alignment of MSCHE Standards with Institutional Priorities
1.1	Samples of Strategic Plan Achievement 2017-2022
1.2	Samples of Strategic Plan Actions 2022-2027
4.1	Full-time Equivalent (FTE) During Tuition Freeze: 2019-2022
4.2	First-generation Degree-seeking Students (by College) 2016-2023
4.3	Recent Retention Rates for Various Populations of Degree-seeking Students
4.4	Students Completing College Success Seminar Class: Retention Tracked Through Spring 2024
6.1	Bond Covenants-Debt Service Ratio
6.2	Bond Covenants-Liquidity Covenant (\$000s)
6.3	University Student Retention
6.4	University Student Headcount 2019-2023
6.5	Immaculata University Faculty and Staff
6.6	Change in Net Assets from Operating Activities Before Depreciations (\$000s)
6.7	DOE Composite Score
7.1	University Standing Committee Membership Representation

Figures

Number	Description
3.1	Undergraduate Core Curriculum
5.1	Undergraduate Core Assessment Committee: 2020-2025 SLO Assessment Cycle
5.2	Strategic Academic Assessment Department/Division Timeline 2023-2024
6.1	Immaculata's Institutional Effectiveness Model
7.1	Immaculata University Executive Administration

Executive Summary

Immaculata University (IU), a Catholic academic community, founded and sponsored by the Sisters, Servants of the Immaculate Heart of Mary (IHM), is committed to scholarship, formation of the whole person for leadership and service, and empowerment of all to seek truth, promote justice and engage in dialogue between faith and culture. Governance structures and strategic deployment of resources support the University's mission and Strategic Plan, which focus on providing a valuable learning experience and supporting students throughout their education and their professional careers. From evaluating curriculum to alumni outcomes, Immaculata comprehensively assesses educational effectiveness to optimize success for students from any background.

Mission and Goals

Immaculata's mission defines the University's purpose as a Catholic higher education institution, imbued with the spirit of the IHMs, that serves students holistically. The institution's goals both link to and support its mission. Immaculata serves society as it helps women and men of all beliefs to integrate the Catholic intellectual tradition of faith and reason within their liberal and professional education.

Key Findings and Current Initiatives

- » Immaculata University's mission focuses on educating the whole person, receives support across all constituents, and is communicated clearly by the Board of Trustees and the Executive Administration.
- » University publications reflect the mission, and awards recognize internal and external constituents who embody the mission.
- » Immaculata assesses its mission through the strategic planning process and periodic surveys of faculty, staff, and students. The Office of Mission and Ministry encourages reflection on the mission among members of the campus community.
- » Campus Ministry is creating a culture rooted in the IHM-Redemptorist spiritual tradition.

Ethics and Integrity

Immaculata University establishes clear, specific ethical standards. Communication is frequent and forthright across constituent groups. Grievances can be presented with substantive due process and appropriate protections for the aggrieved. Hiring and evaluation of staff and faculty are fair and impartial. Students receive valuable academic experience and get support in responsibly meeting their financial obligations. These structures and policies create a comprehensive framework for truthful and honest behavior by all parties in the IU community.

Key Findings and Current Initiatives

- » The IU Policy Manuals, updated regularly, outline ethical standards for all members of the

community, from the Board of Trustees to the student body. The manuals also include policies to manage conflict and appeals.

- » The recent growth of diverse student populations underscores the University's commitment to diversity.
- » Fair hiring, employment, and separation practices include built-in checks and balances. Exit interviews allow employees to give the University feedback on work environment, job satisfaction, benefits, etc.
- » Faculty and staff undergo annual performance evaluations. Faculty also have multiple avenues to get feedback from students and peers, and through formal reviews conducted in accord with the IU Policy Manual IV.
- » IU offers affordable pricing that resists increases. The Financial Aid Office educates IU students about their financial obligations and helps them make informed decisions.
- » The Diversity, Equity, and Inclusion Committee members continue to support and expand DEI initiatives through development of additional programming.
- » The Office of Human Resources is enhancing recruitment of diverse employees.

Design and Delivery of the Student Learning Experience

Immaculata's central focus is strong preparation of and support for students. Well-qualified faculty and various academic offices guide and support students to help them reach their full potential. The core curriculum, program-specific coursework, and opportunities for experiential learning and research challenge students to engage in the learning process through critical thinking and ownership of their educational journey. Academic personnel evaluate and revise the services provided in response to current and emerging needs.

Key Findings and Current Initiatives

- » Faculty receive institutional support in their design and delivery of student learning experiences.

- » Immaculata publishes clear information about academic offerings.
- » Advisors and online tools keep students apprised of their academic progress and offer them resources to make informed decisions.
- » Institutional partnerships allow Immaculata undergraduate students to pursue graduate study with other colleges, providing accelerated degree completion, cost savings, and scholarships.
- » Immaculata fosters a coherent higher education learning experience regardless of modality.
- » Undergraduate and graduate students have opportunities to engage in independent and/or faculty-led research projects.
- » The IU Undergraduate Core Curriculum fosters students' essential skills and overall formation. The Core Curriculum Committee uses assessment data to enhance programming.

Support of the Student Learning Experience

One of Immaculata's hallmarks is extensive student support services. Support staff members possess credentials and professional experience commensurate with their roles and responsibilities. Retention and graduation rates as well as graduate exit surveys document that students' needs are being met. IU has expanded student support programs and activities, such as the addition of the IHM Student Center, the expansion of Learning Support Services, and programming within the Diversity, Equity, and Inclusion Office.

Key Findings and Current Initiatives

- » Admissions processes are clear, consistent, and supportive. Advances in the use of technology and personal engagement across colleges and stages of admission demonstrate commitment to supporting students and their success from their first encounter with the University by providing a more engaging, informative student portal (Slate).
- » The institution contains costs and supports students in financing their education through aid packages and financial aid counseling.
- » Credit evaluation and recognition of alternative learning experiences for credit uphold the academic integrity of IU programs and allow students to optimize their learning from other sources.
- » IU staff design orientation programs appropriate for each student population and ensure that these programs reflect the University mission and core values.

- » Immaculata maintains a high retention rate across student populations, supported by programming for diverse populations and efforts to engage students academically, socially, and spiritually.
- » Facilities upgrades respond to evolving student needs and support their development.
- » Surveys and assessments inform decision-making to create a vibrant student experience.
- » To address the unique needs of first-generation students, IU launched the First@IU initiative in fall 2022.

Educational Effectiveness Assessment

Assessment of educational effectiveness is a multi-faceted, high-quality, formal, 360-degree process. IU uses several assessment methods, including annual institutional and departmental planning, 5-year academic department/program assessments, Undergraduate Core learning assessment, and accreditation standards at the institutional and programmatic levels. Assessment best practices, standards, and results are disseminated across the institution and, as appropriate, are shared with the public.

Key Findings and Current Initiatives

- » Assessment support is offered institutionally, and dissemination of results allows for collaboration and improvement of pedagogical practices and learning opportunities.
- » The University states clear student learning outcomes for its programs, responsive to the mission.
- » Educational effectiveness is measured by such metrics as job placement rates, professional licensure rates, and alumni satisfaction.
- » Attention to students and their needs, both through formal assessments and informal interactions, spurs changes such as the revised Core and the re-imagined First-Year Seminar.
- » The University's teaching and learning center, CASTLE, develops ways for faculty to collaborate and learn from each other, and the Academy for Metacognition allows faculty to discuss pedagogical and assessment practices.
- » The Academic Assessment Hub stores assessment documents and supports both committee and 5-year review processes. The Office Academic Assessment envisions expanding the site to become a primary resource for academic assessment activities.

Planning, Resources, and Institutional Improvement

Immaculata University systematically integrates institutional long- and short-term planning, aligns and allocates resources, and involves participants at appropriate levels to achieve its goals and mission. University stakeholders use resources wisely to fulfill Immaculata's mission and goals. Assessment across the institution enables responsiveness to immediate needs as well as to strategic initiatives, enabling improvement of University programs and services to continue to address opportunities and challenges. To thrive as an institution, Immaculata offers competitive tuition prices, relevant programs, strategic promotional campaigns, and student recruitment in expanding geographical areas.

Key Findings and Current Initiatives

- » Financial planning and budgeting are aligned with the institutional mission and plan, managed effectively with appropriate institutional engagement, and reflect ethical stewardship.
- » With the implementation of appropriate IT staffing and essential security and compliance services, Immaculata utilizes technology that aligns with the Strategic Plan and that benefits student success.
- » Despite the changing public opinion and increasing costs of higher education, Immaculata remains fiscally sound through strong financial control.
- » The University values its employees by offering a pilot of flexible work options, summer Fridays off, and additional employee benefits.
- » The annual financial audit provides important feedback on institutional processes while it confirms the ongoing effectiveness of the University's fiscal management.
- » All University units participate in annual planning processes that lead to institutional improvements and evaluation of use of resources.
- » Immaculata is evaluating both expansion of the purchase order system to all departments and enhancements to the budget process through budgeting and planning software.
- » Immaculata is responding to student physical needs by optimizing space to provide additional residential capacity and using a generous donation to fund extensive dining hall renovations.

Governance, Leadership, and Administration

The institution's administrative structures allow for consistent implementation of the Strategic Plan. Evaluating the effectiveness of institutional structures has led to a new college structure, the creation of the office of the VP for Mission and Ministry, and the introduction of OculusIT for technology management. These governance structures provide stability and flexibility to operate through committees, dialogue with stakeholders, and gather input and data.

Key Findings and Current Initiatives

- » Immaculata University's charter and mission confirm education as the University's primary purpose; bylaws define structures ensuring appropriate oversight and autonomy within its operations.
- » The IHM congregation embraces the University's mission in tangible and spiritual ways, seen clearly in the vital presence of Sisters in campus life and continuing financial support.
- » The Board of Trustees safeguards the University's mission, assesses fiscal soundness, and fosters active dialogue among members. The BOT functions through various committees and conducts regular self-assessments. Trustees maintain a fiduciary relationship with the University and adhere to a conflict of interest statement.
- » The President is supported by qualified administrators overseeing various University divisions. Regular meetings and communication channels help align goals and action.
- » Faculty actively participate in governance through the University committee structure. Shared governance invites faculty input in decision-making. A faculty work group is examining faculty engagement in shared governance.
- » Immaculata's leadership utilizes data-driven decision-making in all facets of University operations in alignment with the IEP and including regular evaluation of leadership and governance structures.

Introduction

Overview and History

Immaculata University (IU) is a Catholic, comprehensive, coeducational institution originally founded as Villa Maria College in 1920 (<https://www.immaculata.edu/>). It was the first Catholic college for women in the Philadelphia area. Accredited by the Middle States Association in 1928, the college changed its name to Immaculata College in 1930. In 1969, Immaculata created the Evening Division for adult undergraduate students, expanding education to both men and women, and added graduate-level programs in 1983. In June 2002, Immaculata College received confirmation of University status from the Pennsylvania Department of Education (PDE). In 2003, the Board of Trustees approved the College of Undergraduate Studies to become coeducational starting fall 2005. PDE approved Immaculata University to offer fully online degree programs in 2006.

Immaculata's mission respects both the history of the institution and its vital role in shaping 21st century servant-leaders as it speaks to an academic community rooted in the Catholic intellectual tradition, committed to scholarship and holistic development of the person for effective engagement with the world around them (Standard I).

Immaculata has continued seeking new ways to fulfill its mission by providing highly relevant educational experiences responsive to societal needs and fostering strong student outcomes. In response to regional employer needs, new academic programs—including cybersecurity, second-degree pre-licensure nursing, athletic training, business administration, and health care management—engage learners in emerging fields. Partnerships with regional higher education institutions create pathways for IU undergraduate students to seek specialized graduate programs. Both dual enrollment with several high schools as well as off-site undergraduate and graduate program offerings provide convenient and affordable access to educational offerings. Such initiatives demonstrate a vibrant and responsive engagement in academic excellence that serves emergent needs.

Immaculata's expansive suburban campus is located 30 miles west of Philadelphia in economically vibrant Chester County. Across its three colleges—the College of Undergraduate Studies, the College of Nursing and Health Professions, and the College of Graduate Studies and Research—the University currently serves men and women of all ages, offering three doctoral programs, 12 master's degree programs, and more

than 60 undergraduate majors, minors, certificates, and pre-professional programs. Select programs at each level are available online. The fall 2023 enrollment across all three colleges was 2,426 students [E6-07]. The majority of students come from the Mid-Atlantic region, with about a quarter of undergraduates being first-generation college students [E4-48]. Enrollment of degree-seeking minority populations over the three colleges is 24.0%, representing a 5% increase over the past ten years [E2-58].

As of fall 2023, Immaculata employs 88 full-time faculty members augmented by part-time adjuncts and 161 full-time and part-time administrators and staff. These educators continue a tradition of academic excellence sustained within an environment of care for and interest in each individual student: a spirit fostered by the Sisters, Servants of the Immaculate Heart of Mary, who first established and continue to sponsor the University. The genuine, personal care shown to each student in an atmosphere of respect, vitality, and warmth is one of the distinctive characteristics of Immaculata (Standard II). Complementing an environment of service and care present among faculty and staff, Immaculata University provides a variety of student support services, including counseling, learning support, and career and professional development. Immaculata University values each student and empowers them to chart their own course without getting lost in the crowd.

Immaculata students engage as members of a comprehensive academic community that includes robust opportunities for service and experiential learning. Many Immaculata students participate in valuable internships, field experiences, and practicums as part of their academic programs (Standard III). The University's strong connections to hospitals, schools, businesses, and other organizations in Southeastern Pennsylvania and the tri-state region of Delaware, New Jersey, and Pennsylvania allow students to apply their knowledge and prepare for their careers as ethical professionals and service-oriented leaders. Using assessment data effectively, faculty and administrators leading academic programs continue to improve and refine both the curriculum and the student learning experience (Standard V).

Inherent in the institutional mission, service activities are integrated throughout the campus community. Campus ministry, clubs, sororities, fraternities, athletic teams, honor societies, and service-learning classes all provide opportunities for service, leadership, and spiritual and cultural growth. The University runs a food cupboard, IU Cares, to support any students or staff experiencing food insecurity and maintains a garden that provides fresh vegetables shared with local food banks (Standard IV).

Under the leadership of its first lay president, Barbara Lettiere, Immaculata has seen significant capital improvements, such as new state-of-the-art nursing simulation labs (2019 and 2021), the IHM Student Center (2019), the Parsons Science Pavilion, the applied technology/cybersecurity lab (2022), and the business lab (2023) (Standard VI). Under the leadership of the President and Executive Administration and with collaboration from across the university, Immaculata continues to respond creatively to the needs of current and future IU students (Standard VII).

Progress Responsive to 2019 MPPR

The University employs indicators across programs and populations that help track both student success and institutional effectiveness. Such indicators include first-year retention rate assessment in the traditional undergraduate population, ranging from 80-85% between 2021-23 **[E4-60]** and 150% baccalaureate completion rates ranging from 61-69% **[E5-52]**, high satisfaction ratings across colleges in graduation surveys **[E1-60—E1-62]**, and programmatic achievements such as first-time 97.92% NCLEX pass rates for nursing students in 2023 [\[https://www.immaculata.edu/about/consumer-information/\]](https://www.immaculata.edu/about/consumer-information/).

Immaculata University's fall full-time equivalent (FTE) decreased 16.78% from 2014 to 2018 (Table I.1) **[E4-20]**. The fluctuation in the traditional undergraduates and graduate students has been minimal. The most significant fluctuation has occurred in the adult undergraduate population.

As part of the institutional response to the enrollment decrease, the University added new programs to its academic portfolio to garner a larger market share,

including but not limited to seven new graduate and six new undergraduate programs, launched between fall 2018 and fall 2022, with another two master's, two bachelor's, and one associate program beginning in 2023-24. Immaculata University continues to expand its academic portfolio, enhance marketing, strengthen recruitment and enrollment management, and grow strategic partnerships.

Additionally, the University froze tuition rates to help ease the financial burden on students, with the undergraduate comprehensive full-time tuition remaining at \$26,500 from 2017 to 2019 and then \$26,900 from 2019 through 2022. The per-credit tuition cost for undergraduate students remained flat (\$540 per credit) from 2018 through 2022; in 2023 IU reduced the per-credit rate to \$465 for most baccalaureate degree programs. The per-credit tuition for master's, Ed.D. and Psy.D. courses (\$710, \$955, and \$990, respectively) remained steady from 2019 through 2022. In 2019, 2020 and 2021 the University enrollment began to stabilize, yielding a 6% increase in enrollment in 2021 from 2018. In addition, in fall 2021 the traditional full-time undergraduate enrollment reached a seven-year high despite the pandemic. The FTE in the adult undergraduate population has been on a decline. The decline is attributed to increased competition, reductions of employers' tuition reimbursement and area hospitals eliminating the requirement for registered nurses to earn their baccalaureate degree. The University has developed strategies beyond tuition rate adjustments, including solidifying connections and collaborations between marketing and admissions teams, partnering with EAB for adult learner lead generation, and launching a new student-journey focused website to stabilize enrollments in the adult undergraduate population.

Table I.1

Full-time Equivalent (FTE) 2014-2023

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Traditional Undergraduate Students & Dual Enrollment	1041	970	905	828	813	882	931	985	1000	1043
Adult Undergraduate Population	616	441	358	363	309	290	309	261	195	179
Graduate	624	625	572	566	555	560	535	537	524	537
Institutional FTE	2281	2036	1835	1757	1676	1732	1775	1782	1719	1758

The Pandemic and Immaculata's Response

In March 2020, the world went on lockdown in response to COVID-19. Existing technology infrastructure, previously mandated training, and online student support resources positioned Immaculata to be able to pivot effectively to online operations, both within and beyond the learning spaces. The Executive Administration team, composed of the President and vice presidents, worked collaboratively to navigate uncharted territory while maintaining transparency of process. At the onset of COVID-19, the President held daily Executive Administration meetings to accommodate quick decision-making and ensure timely University response. This executive team implemented a responsive plan that included a COVID task force [E2-32] as well as stakeholders from all areas of the University responsible for guiding initiatives in response to the pandemic. The Board of Trustees maintained regular meetings with campus leaders and received briefings regarding state and local guidance on health and safety.

Moving entirely to online instruction in late March 2020, the University's continuity of instruction and student support was successful thanks to the tireless efforts of faculty, staff, and administration. Leveraging both standing communication processes, such as the weekly electronic newsletter (*Dome Digest*), as well as augmented efforts such as the University COVID website and direct communications from the President, the IU community received regular updates as understanding of the disease grew and best practices evolved [E2-32]. To retain the sense of community, the Vice President for Mission and Ministry instituted both video and written "mission moments," shared with the entire IU population, to bolster the mission experience lived out on campus. The Moodle learning management system became another platform for communicating learning-specific resources to students and faculty. Moodle was customized to assist faculty and students with navigating synchronous remote learning, including a custom link in each course section to the course's dedicated Google Meet room.

Immaculata also awarded students federal COVID money, paying specific attention to students with greatest financial need [E2-32, p. 14]. Another effort to respond to campus safety and well-being included the allocation of federal funds to upgrade HVAC systems and purchase personal protective equipment [E2-32, p. 16].

By fall 2020, students were able to return to the classroom in accordance with the COVID task force work plan [E2-31], with social distancing and a hybrid

in-class/online model referred to as "Virtual Live." Online Learning and Curriculum & Instruction team members provided training for the use of that technology to faculty both on campus and through recorded training sessions. Throughout the 2020-21 academic year, Immaculata faculty and learners continued with a combination of online and virtual live instruction. Upon establishing a vaccine mandate for all students and employees effective fall 2021, the University returned to pre-pandemic classroom experiences. With that came both a renewed sense of community but also lessons learned about the benefits and limitations of technology in and beyond the classroom, increased sensitivity to work-life balance [E6-16; E6-17; E6-18; E6-19], and enhanced attention to students' emergent needs [E4-71; E4-72; E4-110].

The University responded creatively in maintaining community engagement; the VPAA established monthly virtual coffeehouses for faculty and similar periodic events for academic affairs staff. While COVID restrictions delayed the May 2020 commencement ceremony, graduates were invited to participate in a socially distanced on-campus ceremony in November 2020; the May 2021 ceremonies, despite attendance restrictions, allowed many more graduates to celebrate on campus with family. Throughout the tumultuous COVID experience, all at Immaculata worked diligently to ensure the safety of the community and to deliver quality education. IU dropped its mask mandate in spring 2022, and the campus returned to full operations [E2-32].

Looking Ahead: University Structure, Strategic Plan, and Institutional Priorities

As part of her forward-thinking agenda, President Lettiere called for a reconsideration of the existing three-college structure to be more responsive to the size of the institution, future opportunities, and university visibility. Using the work of a presidentially appointed institutional reorganization task force (spring 2021) and following an evaluation of proposed plans by executive leadership, the University established a new, three-college structure that launched in fall 2023. The new structure, as illustrated in Table I.2, retains the distinctive identity of the College of Graduate Studies (under a new name, College of Graduate Studies and Research), revises the College of Undergraduate Studies to serve both comprehensive tuition and part-time undergraduates, and establishes a new College of Nursing and Health Professions to place a special spotlight on the needs of and collaboration among our growing undergraduate and graduate health-related majors.

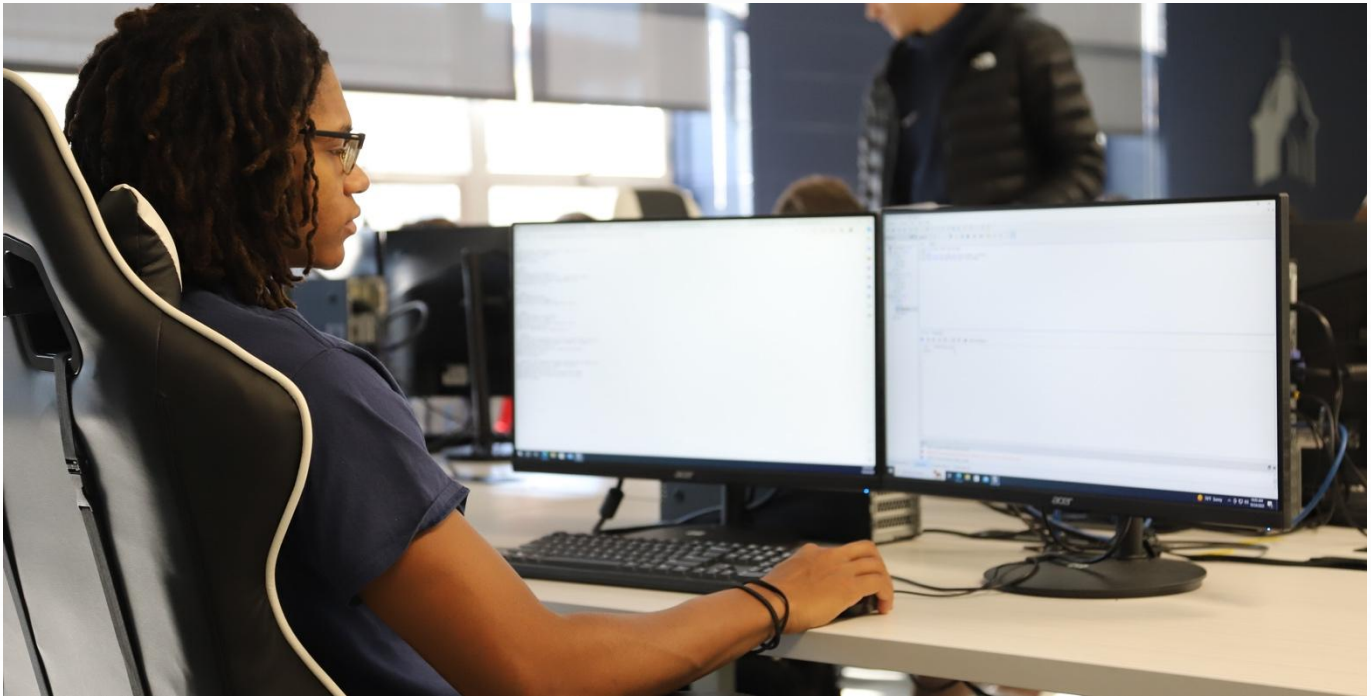


Table I.2

Immaculata University College Academic Structure Effective Fall 2023

College of Graduate Studies & Research	College of Undergraduate Studies	College of Nursing & Health Professions
<i>Graduate Programs in:</i>	<i>Undergraduate Programs in:</i>	<i>Undergraduate & Graduate Programs in:</i>
• <i>Business, Fashion and Leadership</i> • <i>Education</i> • <i>Music</i> • <i>Psychology & Counseling</i>	• <i>Applied Technology & Mathematics</i> • <i>Arts, Languages and Letters</i> • <i>Business, Fashion and Leadership</i> • <i>Civic Engagement</i> • <i>Education</i> • <i>Music</i> • <i>Philosophy and Theology</i> • <i>Psychology & Counseling</i>	• <i>Health, Nutrition and Exercise Sciences</i> • <i>Nursing</i>

Note: Listings above are by department/division

STRATEGIC PLAN AND INSTITUTIONAL PRIORITIES

President Lettiere developed and guided the institution through her first five-year Strategic Plan. Upon reappointment by the Board for a second term in July 2021, she led development of the new Strategic Plan for 2022-2027 **[E1-03]**, which focuses on four main goals ([Chapter 1](#)). The goals and their contingent strategic actions represent a forward-thinking, agile institution positioned to remain an important area leader in higher education.

At the same time as the Strategic Plan was developing, so were the Institutional Priorities that helped frame and guide this Self-Study. In considering the Institutional Priorities, discussion ensued about what makes Immaculata unique and what would sustain the institution for future generations, while remaining cognizant of the mission and emerging Strategic Plan. Upon reflection, stakeholders/collaborators observed that an intrinsic part of the institution is centered on reverencing the God-given dignity of each member of the community while responding to the ever-evolving

needs of society—always with academic excellence, responsible stewardship, and service as key goals.

Members of the MSCHE Steering Committee entered into reflection and dialogue. Recognizing that the Institutional Priorities (IP) would need to align with an anticipated but not-yet-seen 2022-2027 Strategic Plan, communication from President Lettiere, which included the primary goals for the emerging plan, served as a guide in the formation of the priorities. From these reflections and discussion, three Institutional Priorities emerged that collectively capture Immaculata University's mission, hallmarks, vision, and the 2022-2027 Strategic Plan.

The Self-Study reflects these priorities that connect clearly to the mission statement (Table I.3), the Strategic Plan (Table I.4) and each MSCHE standard (Table I.5). The priorities guided the exploration of the University's engagement with each criterion in a meaningful and institutionally relevant manner. These priorities are as follows:

1. Retain and foster institutional commitment to formation of the whole person in an ever-changing and diverse society.

This priority is directly linked to the IU mission, which explicitly mentions "formation of the whole person for leadership and service." The founding Sisters envisioned Immaculata as providing higher-level education for women in the early twentieth century where and when it was non-existent; so too will IU students confront the current and emergent needs of society through their learning and service, in and outside of the classroom. In this priority, the University remembers that learning moves outward, as is stated in the IU motto: "Scientia floret virtute"—knowledge flourishes in virtue. Immaculata prepares students to lead as they and society change.

2. Ensure institutional viability through data-driven decision-making and responsible stewardship of institutional resources.

Through ongoing institutional assessment and other evaluative measures, data are collected and analyzed, and the results are employed to ensure continuous improvement across the University. The breadth and scope of these processes facilitate the engagement of constituents across the community.

The institution prioritizes utilizing and maximizing available resources well while using data effectively and efficiently to explore and secure additional resources. This informed decision-making helps to create a campus-wide culture of excellence in all areas.

3. Provide an innovative teaching and learning environment so as to engage our students in a vibrant educational experience.

Learning takes many forms, and this priority includes all learning modalities and educational experiences. The University acknowledges the synergistic characteristic of education: that learning and teaching take place in tandem. Environments, both physical and intangible, create supportive spaces for learning. IU challenges students to engage, think critically, and learn to serve as agents of their own learning. In this priority, innovation spurs new discourse, divergent thinking, and opportunities for interdisciplinary and intercollegiate participation and collaboration.

The Institutional Priorities and the Strategic Plan are interconnected, as the plan articulates how the priorities will be achieved. The priorities, in turn, place the plan within the larger picture of institutional mission. The Strategic Plan priorities are assessed through the established key performance indicators. Tables I.3, I.4, and I.5 depict the linkages that exist between the Institutional Priorities and the mission, the Strategic Plan, and the MSCHE Standards, respectively:

Table I.3*Alignment of University Mission with Institutional Priorities*

Elements of Mission	Priority #1 <i>Formation of Whole Person in a Changing and Diverse Society</i>	Priority #2 <i>Institutional Viability and Resources</i>	Priority #3 <i>Innovative Teaching and Learning Environment</i>
<i>Faithful to our Catholic identity and to the Church</i>	X	X	
<i>Academic community fostering and committed to scholarship</i>	X		X
<i>Formation of the whole person for leadership and service</i>	X		X
<i>Empower all to seek truth, promote justice</i>	X	X	

Table I.4*Alignment of Strategic Plan Goals with Institutional Priorities*

Goals of the Strategic Plan 2022-2027	Priority #1 <i>Formation of Whole Person in a Changing and Diverse Society</i>	Priority #2 <i>Institutional Viability and Resources</i>	Priority #3 <i>Innovative Teaching and Learning Environment</i>
<i>Create a Distinct Brand Identity within a Culture of Inclusion</i>	X		X
<i>Secure and Develop Resources to Strengthen the University and its Key Stakeholders.</i>		X	X
<i>Achieve Enrollment Goal of 3,000 Students and a Retention Rate Above the National Average</i>	X	X	X
<i>Enhance Academic Excellence through Teaching and Learning</i>	X	X	X

Table I.5*Alignment of MSCHE Standards with Institutional Priorities*

MSCHE Standards	Priority #1 <i>Formation of Whole Person in a Changing and Diverse Society</i>	Priority #2 <i>Institutional Viability and Resources</i>	Priority #3 <i>Innovative Teaching and Learning Environment</i>
<i>I. Mission and Goals</i>	X	X	
<i>II. Ethics and Integrity</i>	X	X	
<i>III. Design and Delivery of Student Learning Experience</i>			X
<i>IV. Support of the Student Experience</i>	X		X
<i>V. Educational Effectiveness Assessment</i>	X		X
<i>VI. Planning, Resources and Institutional Improvement</i>		X	
<i>VII. Governance, Leadership and Administration</i>		X	

The new Strategic Plan and institutional structure, paired with the well-considered and mission-reflective Institutional Priorities, provide synergies and opportunities that support Immaculata's mission. As it has from its inception, Immaculata University continues to identify educational and community needs and create pathways for current and future students to engage the world effectively and with purpose.

Structure of Self-Study Report

The following Self-Study Report responds to MSCHE's *Standards for Accreditation and Requirements of Affiliation* (Thirteenth Edition). The report demonstrates Immaculata University's compliance with the Middle States Commission on Higher Education (MSCHE) Standards of Accreditation and Requirements of Affiliation. The chapters, organized by MSCHE's seven Standards, offer an evidence-rich narrative that highlights the institution's strengths as well as growth areas, innovative practices, current initiatives, and future directions based on a careful and iterative review of institutional data. The process reflected throughout this report has allowed the University to critically evaluate itself and understand more fully what drives the institution forward.

In addition to demonstrating how IU currently meets Commission Standards of Accreditation and Requirements of Affiliation and verifying institutional

compliance with accreditation-relevant federal regulations (Compliance), the self-study process provided opportunities for the IU community to:

- » Focus on continuous improvement and quality assurance in the attainment of Immaculata's mission, Institutional Priorities, and the goals of the 2022-2027 Strategic Plan (Continuous Improvement).
- » Engage the Immaculata community in a reflective, inclusive, and transparent self-appraisal process that actively and deliberately seeks to involve members from all areas of the community (Self-Appraisal).
- » Use the self-study process to expand the knowledge, understanding, and participation of the broader University community in the life and vision of Immaculata (Institutional Engagement).

Immaculata University used a Standards-based approach, guided by the lines of inquiry, which were established by each Standard's Work Group. This approach created the opportunity to examine and discuss the Institutional Priorities as they relate to the Standards in a meaningful way that will continue to serve the institution beyond the development of the Self-Study Report. For ease of use, the chart included within each chapter links the Standard criteria and Requirements of Affiliation (ROA) to the chapter heading(s) under which they are addressed.

Chapter 1: Standard I – Mission and Goals

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

Standard I – Criteria Mapping

Criteria	Heading
1A	Centrality of Mission; Linking Mission to Decision-Making
1B	Centrality of Mission; Linking Mission to Decision-Making; Celebrating Mission
1C	Centrality of Mission; Linking Mission to Decision-Making
1D	Linking Mission to Decision-Making; University Mission in Academics; Supporting & Maintaining Mission;
1E	Strategic Plan
1F	Linking Mission to Decision-Making; Celebrating Mission; Mission Orientation; University Mission in Academics; Supporting & Maintaining Mission
1G	Centrality of Mission; Linking Mission to Decision-Making
2	Supporting & Maintaining Mission; Strategic Plan
3	Strategic Plan; Supporting & Maintaining Mission
4	Assessment of Mission and Goals
ROA 7	Centrality of Mission; Linking Mission to Decision-Making
ROA 8	Periodic Evaluation; Assessment of Mission and Goals
ROA 10	Linking Mission to Decision-Making; Supporting and Maintaining Mission; Periodic Evaluation

Overview

Immaculata University (IU) is a Catholic, comprehensive, coeducational institution, originally granted a college charter as Villa Maria College in 1920, making it the first Catholic college for women in the Philadelphia area. Today, after 100 years of growth, Immaculata University continues to serve the needs of society as it helps women and men of all beliefs to experience and integrate the Catholic intellectual tradition of faith and reason within their liberal and professional education [E1-01, 1.1]. The mission continues to support its primary focus, articulated in its Articles of Incorporation: “to establish, conduct and maintain a University for the higher education of men and women” [E1-01, 1.4.2]. The “education of the whole person for leadership and service” is still central to the Immaculata experience.

Practice and process demonstrate that strategic goals align with and flow from the mission, and thus, the mission is brought to life as faculty, staff, and students participate in achieving those institutional goals. Therefore, the University meets the MSCHE

requirements of Standard I, its four criteria, and *Requirements of Affiliation* 7, 8, and 10.

Centrality of Mission

Throughout the University's history, the mission and motto have reflected a commitment both to maintain the Catholic identity and reflect the IHM charism as well as establish educational programs that foster scholarship, prepare persons for leadership and service, and engage in dialogue between faith and culture. The current mission statement and motto remain faithful to this focus, welcoming people of all faiths to join the IU community.

MISSION OF IMMACULATA UNIVERSITY

Immaculata is committed to scholarship, the formation of the whole person for leadership and service, and the empowerment of all to seek truth, promote justice, and engage in dialogue between faith and culture [E1-01, 1.2.4]. Immaculata University is a Catholic academic community, founded and sponsored by the Sisters, Servants of the Immaculate Heart of Mary.

CORE VALUES

Immaculata's mission is supported by five core values: faith, community, knowledge, virtue, and service [E1-02]. The core values express underlying principles lived out in the culture of Immaculata.

- » **Faith:** Immaculata University expresses its Catholic identity by proclaiming the Gospel message and inviting all members of the community to seek truth and meaning.
- » **Community:** With respect for diversity, the University seeks to be inclusive while striving to nurture the spiritual, moral, intellectual, and social/physical wellbeing of all its members.
- » **Knowledge:** Immaculata University points to a knowledge that flourishes in virtue flowing from reflection and a genuine search for truth.
- » **Virtue:** The University emphasizes the kind of moral strength that comes from the wisdom earned by reflective study and vigorous application and deepens commitment to ethical integrity.
- » **Service:** The University values service because justice demands action in favor of all members of the human family, especially the most vulnerable.

MOTTO

The University motto, which reads in Latin, *Scientia floret virtute* (Knowledge flourishes in virtue), expresses the ideal of a true liberal arts education in the Christian tradition [E1-01, 1.2.4].

STRATEGIC PLAN

Immaculata's mission formed the foundation for the development of the Strategic Plan and its strategic goals. In the creation of the 2022-2027 plan, President Lettiere articulated that the plan embraces the mission as it "provides pathways and opportunities to further individuals' success" [E1-03]. The plan provides realistic guidance to the IU community to promote a "vibrant, thriving institution" through the four goals. Each goal embraces an aspect of the Institutional Priorities so that the University provides education that is relevant to today's student. Stated explicitly, the goals are:

- I. Create a Distinct Brand Identity within a Culture of Inclusion
- II. Secure and Develop Resources to Strengthen the University and its Key Stakeholders
- III. Achieve Enrollment Goal of 3,000 Students and a Retention Rate Above the National Average
- IV. Enhance Academic Excellence through Teaching and Learning [E1-03].

Linking Mission to Decision-Making

Both the University's mission and its aligned Strategic Plan form a nexus of operational, strategic, and aspirational focus for the entire University community. The mission vitalizes the work of the University, from orienting new campus members and student life through program development and institutional culture. Both mission and strategic goals encourage scholarly inquiry and creative activity across all levels of student learning and community engagement (Chapter 3). Faithful to its Catholic identity and traditions, Immaculata's mission expounds an approach to life that is catholic in the broader sense as well, welcoming community members (both employees and students) from all spiritual traditions and cultures into an environment that values each person and inculcates a sense of caring across the institution. The strategic goals allow the University to put its mission into action. The strategic actions form a backdrop to be implemented by campus offices and departments working to ensure that each component of the institution is intentionally working to achieve those goals.

During 2020-2021, work on the 2022-2027 Strategic Plan began under the guidance of the Executive Administration; each executive member conducted discussions about the plan within their respective areas. The Executive Administration approved the plan's goals and objectives, and the Board of Trustees affirmed the plan. The President disseminated the plan to the IU community, saying: "Immaculata's 2022–2027 Strategic Plan, through its four strategic goals, embraces our mission and encourages the entire community to engage creatively as we promote our vibrant, thriving institution!" [E1-03, p. 2] (Chapter 6). Mission is the central focus in identifying initiatives and allocating resources [E1-04].

As the governing body of Immaculata University, the Board of Trustees (BOT) understands, endorses, articulates, supports, and promotes the mission of the University. The Board safeguards as well as strengthens the University mission, and in doing so, the mission of the trustees becomes more focused as these missions are intertwined [E1-01, 1.4.2.2]. The Board of Trustees' fall 2021 Self-Assessment report documents a rating of 4.83 mean response (with 5 being "strongly agree" and 4 being "somewhat agree") to the statement: "I am knowledgeable about and dedicated to Immaculata's mission and core values." BOT members responded with a rating of 4.88 to this statement: "Immaculata's mission and core values are regularly referenced and considered when making decisions" [E1-05]. In promoting the mission, in 2022, the BOT suggested and approved exploration of the "seeking truth" element of the mission statement as a focus for

the following academic year, and the Vice President for Mission and Ministry (VPMM) sent weekly emails to the IU community expounding upon this foundational concept [E1-06].

The mission is promoted to both internal and external constituents. The IU website, publications, social media, and other forms of communication to external audiences focus on the mission. The website specifically highlights the mission through its Mission and Heritage and Campus Ministry pages, making the mission known to all [E1-02]. Internally, the mission provides a shared context for the development of student programming, as seen in the work of campus ministry, in the design of all new academic programs, and in the links made between student life and the University mission.

The University has staff across all operating units who create an environment that embodies the spirit of a Catholic institution through a welcoming and helpful sense of service. The centrality of mission is expressed significantly in the collaboration between the IHM congregation and the University, as seen in the active presence of the sisters in many positions throughout the University as staff, faculty, and members of the Board of Trustees (Chapter 7). Additionally, the IHM Student Center is one tribute to that connection.

The Office of Mission and Ministry was established in 2016 to maintain and share the heritage of the founding congregation, the Sisters, Servants of the Immaculate Heart of Mary, and to enliven and sustain a sense of University mission across the campus and beyond. The inaugural Vice President for Mission and Ministry (VPMM) worked with an ad-hoc Mission and Heritage Committee to engage the University community in discussions about mission and core values, using the results to reaffirm or revise those statements, as needed. The campus-wide dialogue resulted in a revised mission statement and core values, which the community reviewed and approved, effective fall 2017. The mission statement and core values are evaluated periodically; however, specifying the time frame more explicitly would ensure ongoing engagement of the community with the mission and core values [E1-04].

The VPMM promotes the mission as an active and intentional part of the University through ongoing initiatives that engage IU and the wider community. Some of these initiatives have included: community engagement with Catholic Relief Services (CRS), Spirituality Under the Dome, Lenten luncheons, and Mission Moments communications [E1-07—E1-09]. Following on 2022-23's reflections on the mission concept of "seeking truth," the 2023-24 focus is on the final phrase of the mission statement, "engage in a

dialogue between faith and culture" [E1-10]. In a recent initiative to make the mission come alive for all new employees, the VPMM coordinated with HR to meet with all new faculty and staff, asking them to share their understanding of the mission and how they represent the mission in their roles [E1-11; E1-12]. In addition, the VPMM meets with all new hires and engages with University departments to reflect on what the IU mission means. In these meetings, she discusses how to apply the mission to current practices and roles, answers questions, and provides guidance on the specific details of the mission [E1-13; E1-14]. In addition to meeting with employees, the VPMM meets with students to discuss the mission [E1-15].

Celebrating Mission

Immaculata effectively communicates and publicizes its mission and values using many forms of media to transmit the message to internal and external audiences [E1-02; E1-16—E1-18]. In addition, the University acknowledges individuals who exemplify its values through specific awards. These awards serve as a public reminder of the IU mission and values lived both within and beyond the campus [E1-19—E1-23]. Examples include:

- » **Awards for Alumni/Friends of Immaculata:** The Mother M. Camilla Maloney Award is presented annually to those who demonstrate leadership and vision to sustain the future of Immaculata through service—including volunteerism, counsel, and philanthropic support—to carry on the mission and vision of Mother Camilla. Awardees receive recognition on the website and are featured in the *Immaculata* magazine and *Highlights from the Hill* electronic newsletter [E1-21; E1-22].
- » **Awards for Students:** The Saint Catherine Medal is awarded to a junior who exemplifies Immaculata's mission. Kappa Gamma Pi members selected St. Catherine of Alexandria in 1926 as their organization's patron saint because of her great faith, intellect, and integrity—qualities to which members of the society aspire. The award is presented at the Mass of the Holy Spirit at the beginning of the fall term [E1-24, p. 19; E1-19; E1-20].
- » **Awards for Faculty and Staff:** University employees nominate for the Golden Heart Award faculty and staff who demonstrate in tangible and explicit ways the advancement of the IU mission and lived examples of the core values, including IU's heart/passion in nurturing humanity and caring for the earth [E1-25—E1-27].
- » **Awards for the Broader Community:** The Immaculata Medal is bestowed on those who

have publicly exercised creative leadership or given evidence of sound scholarship in the arts, letters, sciences, or professions or served the University in an extraordinary manner. These are individuals whose lives are consistent with the highest values and aspirations of Catholic education [E1-28, p. 35].

Mission Orientation

Immaculata University engages all new full-time faculty, staff, and administrators in a workshop conducted by the VPMM on the University mission. While the type of program has varied, mission orientation has been consistently a part of the onboarding of faculty, staff, and administration and includes both an educational component as well as the opportunity for dialogue among the participants [E1-11; E1-12; E1-29; E1-30]. Orientation also includes a spiritual reflection; the history of the Sisters, Servants of the Immaculate Heart of Mary; an explanation of the IHM charism of love, creative hope, and fidelity; and the history of Immaculata University [E1-18; E1-31]. Mission orientation is essential, as it provides a common understanding of the mission's significance as foundational in the University.

UNIVERSITY MISSION IN ACADEMICS

An awareness of mission informs academic life through processes and procedures that directly touch the lives of faculty, administrators, and students. New students find the mission posted and explained on the IU website and in the Undergraduate and Graduate Catalogs [E1-16; E1-17]. First-year students learn more about the mission during First-Year Seminar classes (resumed post-COVID, 2022). Course syllabi must include the mission statement [E1-32—E1-34], and during the first class, some teachers engage students in a discussion of mission from their experiences and perspectives. When departments/divisions publish their 5-Year Program Reviews, they address “the relationship of the department/division’s mission and/or vision to the University’s mission and vision statements” [E1-35—E1-39]. When programs share their five-year reports at faculty meetings, faculty members gain new insights as they learn how other academic disciplines interpret and live out the University mission. Disciplines seeking a new major/concentration must describe how the program links to the University mission and is responsive to the Strategic Plan [E1-40]. These systematic and universally employed strategies keep a sense of mission at the forefront of academic life. Moving from the published mission statement to living the mission takes time and intentionality; these repetitions of the mission in various materials help with that process.

MISSION BEYOND THE CLASSROOM

The IHMs trace their roots to Father Louis Florent Gillet, a Redemptorist priest who followed the rule of St. Alphonsus Liguori, a seventeenth century bishop who cared for the abandoned poor. The Ambassador Fund for Catholic Education awarded Immaculata University a \$29,709 grant for 2022-23 [E1-41; E1-42] and renewed it in 2023-24 for \$49,741 [E1-43]. The funded program supports Campus Ministry’s work in creating a culture rooted in the IHM-Redemptorist spiritual tradition and enabling them to develop new retreat programming for the IU community. In year one, funding helped create/redesign three retreat programs, begin book discussion groups, and bring in speakers for Community Night [E1-44]. The second year of the grant will enable Campus Ministry to add a mission trip program, continue the retreat redesign, and continue to expand the programming covered in year one to create a distinctly IHM-Redemptorist experience for the IU community. This initiative fosters vitality across the entire IU community and marks an area of cross-campus synergy and growth by marshaling the resources of Campus Ministry, collecting and analyzing data regarding evolving programming, and exploring and securing additional resources. In this way, Immaculata ensures institutional viability through data-driven decision-making and responsible stewardship of institutional resources.

The University community sees the mission to “promote justice and engage in dialogue between faith and culture” as including care of “our common home,” the Earth. In 2021, Immaculata formed a group made up of faculty, staff, and students who have developed programming and initiatives in support of Pope Francis’ seven *Laudato Si’* goals [E1-45]. Signs reminding the community to recycle and programs that promote sustainable practices are some ways that IU cares for the earth and those who grace it. This growing and creative initiative garners support from all constituencies and aligns with other campus efforts, such as the ongoing invitation for the IU community to contribute to the IU Cares Food Cupboard for students [E1-46].

Supporting and Maintaining Mission

Over 103 years, the wording has changed, but the mission of IU remains: to express its Catholic identity, to reflect the IHM charism, to establish educational programs that foster scholarship, to prepare persons for leadership and service, and to engage in dialogue between faith and culture. The University has effectively incorporated institutional periodic evaluation, self-reflection, and realistic goals appropriate to higher education and consistent with its mission.

LINKING MISSION TO PLANNING

The Immaculata community embodies the mission in assessing programs and future planning. Table 1.1

offers a few examples of how mission-focused strategic objectives were embraced and achieved in the 2017-22 Strategic Plan [E1-47].

Table 1.1

Samples of Strategic Plan Achievement 2017-2022

GOAL	ACTION TAKEN
I. Academic Programming Innovations Advance the Catholic Identity, Catholic Intellectual Tradition and Catholic Social Teaching across all departments in practical and specific ways.	January 2020 Faculty Workshop Presentation: "A Matter of Minds and Hearts: IU's Mission" [E1-48].
V. University Visibility Improvements Intentionally promote the IHM charism to students, faculty, staff, parents, and the greater community.	Developed the IHM Student Center and relocated Campus Ministry to serve the community [E1-49].
VIII. Organizational Culture & Talent Management Promote campus-wide integration of our Catholic mission, supported by the IHM charism, to drive and strengthen the Immaculata community	December 8, S'mores with Sisters [E1-50]; Mission Moments videos; Mission Orientation for new hires (previously done at IHM Motherhouse) during new employee orientation [E1-11; E1-12].

Another snapshot of mission incorporation and review is illustrated in the priority placed on mission in the 2022-2027 Strategic Plan. The overriding impetus of the plan, "Immaculata University is a mission-driven institution that provides pathways and opportunities to further individual's success" [E1-03, p. 3], highlights the centrality of mission and demonstrates the institutional commitment to formation of the whole person in an ever-changing and diverse society. The current plan

concentrates specific mission-oriented actions under a more comprehensive goal. While this plan is only in its second year, measures are well underway to bring the Strategic Plan 2022-2027 to fruition [E1-51; E1-52]. University divisions have established key performance indicators that track, measure, and analyze processes towards the strategic goals; an example can be seen in Academic Affairs Key Performance Indicators [E1-53].



Table 1.2
Samples of Strategic Plan Actions 2022-2027

GOAL	ACTION TAKEN
I. Create a Distinct Brand Identity within a Culture of Inclusion Live and promote the IU mission. Maintain a supportive Catholic learning community through the IHM tradition. Enhance opportunities for students and employees to experience the mission. Welcome all individuals into a safe and inclusive community that values all identities, celebrates diversity, embraces sustainability, and serves the needs of all stakeholders. Engage in dialogue between faith and culture. Increase awareness of the University's identity and enhance its reputation.	Continuation and refinement of work of the Office of Mission and Ministry in education and celebration of mission [E1-50]. Enhanced website presentation of mission [E1-02 Mission & Ministry Website], visible IHM presence [E1-54], and increased student engagement with mission and ministry [E1-50]. Expanded programming with the Office of Diversity, Equity and Inclusion to raise campus awareness and respect [E1-55]. Enhanced required courses in philosophy and theology for undergraduates [E1-16, p. 51]; social action projects [E1-50]; missionary trip to Peru [E1-56]. Winter 2023 <i>Immaculata</i> magazine story about spiritual support for students [E1-57].
IV. Enhance Academic Excellence through Teaching and Learning Expand mission-relevant undergraduate and graduate programs to meet emerging trends and regional workforce needs.	Explore and promote programs that foster human well-being, ethical awareness, and societal concern, such as the creation of LPN to BSN and FNP programs [E1-58] and AS in Social Services for education support personnel [E1-59].

Periodic Evaluation

How the mission is experienced finds expression in the commitment of students to service, documentation of service activities evidenced in the Faculty Annual Profiles, and surveys that evidence positive responses to mission-related questions [E1-60, Q29; E1-61, Q16; E1-62, Q26].

GRADUATING STUDENT EXIT SURVEYS

Undergraduate students responded to five statements regarding mission and identity on the CUS Exit Survey demonstrating how elements of mission are present, using a 5-point scale with 5 being excellent. The information gathered between 2018-2023 (2020 COVID - no survey), shows that students agree the IU administration, staff, and faculty “exemplify” the University mission at a better-than-adequate level (4.12; all scores shown in aggregate). The surveys showed that students have a better-than-average familiarity with the University's core values (4.13), and they are familiar with IU's mission statement (3.94). Students indicated they have better-than-adequate community service opportunities outside of the classroom (3.92). Respondents answered favorably to “Immaculata University has helped me to grow spiritually,” with an aggregate score of 3.81 [E1-60, Q29].

Adult students taking the CAPS Graduating Student Survey between 2018-2023 (2020 COVID - no survey) gave similar responses. Respondents indicated that they are familiar with the mission statement (3.86), and IU administration, staff, and faculty exemplify the mission (4.08 score). Respondents indicated they were also familiar with core values (3.94) by rating the statement, “I am familiar with Immaculata University's Core Values.” Respondents said that Immaculata University has helped them to grow spiritually (3.58) [E1-62, Q26].

These survey scores over the last five years indicate that students are familiar with the University's mission statement and core values and convey their overall impression that IU administration/staff and faculty exemplify the mission consistently. Immaculata added new mission-related statement ratings to CGS Graduating Student Survey in 2023 [E1-61, Q16]. Graduate respondents also indicated familiarity with the mission (4.22) and core values (4.29), perceived that the mission and core values were embedded in the graduate experience (4.17), and agreed that administration and staff exemplified the mission (4.31).

EMPLOYEE ENGAGEMENT SURVEY 2023

Surveys of employees have explored their awareness of the University's mission. In spring 2023, the Office of Institutional Research and Effectiveness (IRE) distributed an employee engagement survey to ascertain the perceptions and feedback from Immaculata employees [E1-63]. The results showed a consistent awareness of mission implementation. IRE asked employees to rate their awareness and perception of the institutional mission at Immaculata through three statements [E1-64, Q1]. Employees rated all three statements highly in aggregate. "I understand the mission of Immaculata University" received the highest ratings (4.64 of 5) in the survey, followed by "I see evidence that Immaculata lives out its mission" (4.30 of 5). Employees also highly rated the statement, "The President and Senior Leaders effectively communicate Immaculata's mission" (4.21 of 5). In combination, these statements indicate consistent awareness and application of Immaculata's mission across the institution.

Assessment of Mission and Goals

The Board of Trustees' Mission and Ministry Committee as well as the Mission and Ministry University Standing Committee periodically review the mission statement. Surveys disseminated to stakeholders also assess mission effectiveness. Each area of the University reflects on their work through the annual planning process and sets realistic goals based on the Strategic Plan, which is informed by the mission [E1-04]. In the end-of-year assessment, departments evaluate the tactics tied to the plan. Through bi-weekly meetings of the Executive Administration, the President and vice presidents engage in dialogue about priorities and processes to communicate progress in fulfilling strategic goals and to discuss emerging challenges and opportunities, which they share with the community as appropriate. Ongoing reflection enhances continuous improvement to ensure that mission, goals, and action align through formal means such as the MSCHE self-study process, external accreditations, 5-year program reviews, and the end-of-year assessment (EOYA) annual planning review. Each of these practices demonstrates institutional commitment to actualizing the mission through concrete action. Oversight and review of plans within institutional units ensure through multi-level reviews that the actions remain relevant and achievable (Chapter 6).

Summary

Immaculata's mission defines the University's purpose as a Catholic higher education institution, imbued with the spirit of the IHMs, that serves its students holistically and states what it intends to accomplish. The

discussion of Standard I demonstrates the University's commitment to scholarship, formation of individuals to lead and serve, while empowering "all to seek truth, promote justice and engage in dialogue between faith and culture." The institution clearly links its stated goals to its mission to specify how the institution fulfills its mission. Immaculata University continues to serve the needs of society as it helps women and men of all beliefs to experience and integrate the Catholic intellectual tradition of faith and reason within their liberal and professional education.

KEY FINDINGS

- » The Board of Trustees and the Executive Administration clearly define and communicate Immaculata University's mission, which provides direction and focus for planning, implementing, and accomplishing the goal of educating the whole person.
- » Print and online publications reflect the mission to both internal and external constituents. In addition, the University presents awards to internal and external constituents who embody its mission.
- » The strategic planning process and periodic faculty, staff, and student surveys assess the ongoing impact of IU's mission. The Office of Mission and Ministry's outreach to the campus community encourages self-reflection on the mission.

CURRENT INITIATIVES

- » Campus Ministry received a grant from the Ambassador Fund for Catholic Education for a proposal entitled "Vivify." The grant was awarded to create a culture rooted in the IHM-Redemptorist spiritual tradition for the entire IU community. The ultimate goal is to create a distinctly IHM-Redemptorist experience for the IU community.
- » The Office of Mission and Ministry highlights the meaning of the mission statement in theory and practice through conversations with faculty, staff, and students, and in weekly emails to constituents.
- » The exit survey for graduate students is being expanded to include questions on mission impact.

FUTURE DIRECTIONS

Responding to the Institutional Priorities (IP), Strategic Plan (SP), and drive for continuous improvement, the evaluation of Immaculata's adherence to Standard I's criteria led to the identification of the following improvements and innovations:

- » Recognizing an opportunity to expand mission engagement, the University will intentionally invite adult undergraduate and graduate students to IU mission-based activities (e.g., CGSR's newsletter) (IP 1; SP I.3 and III.5).
- » The VPMM will investigate a time schedule, in collaboration with the Board of Trustees, to

ensure a formal review of the mission statement and core values of the institution (IP 1; SP I.1).

- » Through campus leadership and committee work, the University will reinforce and further express its Catholic identity as central to its mission, across all aspects of the institution, by advancing initiatives and efforts related to inclusion (IP 1; SP I.4 and IV.1).

Chapter 2: Standard II – Ethics and Integrity

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

Standard II – Criteria Mapping

Criteria	Heading
1	<i>Ethical Standards for All - Manuals and Catalogs</i>
2	<i>Respect in a Diverse Environment</i>
3	<i>Equitable Grievance Policies</i>
4	<i>Ethical Standards for All – Manuals and Catalogs</i>
5	<i>Ethical Standards for All - Manuals and Catalogs; Fair and Impartial Hiring; Fair and Impartial Evaluation Process; Fair & Impartial Employee Discipline & Separation</i>
6	<i>Honest & Open Communication</i>
7A-B	<i>Affordability and Accessibility</i>
8A-D	<i>Institutional Ethics Compliance, Ethical Standards for All - Manuals and Catalogs</i>
9	<i>Assessing Ethics and Integrity</i>
ROA 1	<i>Institutional Ethics Compliance</i>
ROA 5	<i>Institutional Ethics Compliance</i>
ROA 6	<i>Institutional Ethics Compliance</i>
ROA 8	<i>Institutional Ethics Compliance</i>
ROA 14	<i>Institutional Ethics Compliance</i>

Overview

In its mission-focused quest to empower “all to seek truth” and “promote justice,” Immaculata has, for its 103 years of operation, maintained the highest ethical standards, reflective of its founding Sisters, Servants of the Immaculate Heart of Mary and consistent with its unwavering commitment to excellence. The University practices a commitment to ethics and integrity within the institution and the academic community. Aligned with the University mission, the policies and procedures governing behavior, treatment, and engagement of institutional stakeholders endorse and support high ethical standards. Immaculata University meets the requirements of Standard II, its nine criteria, and *Requirements of Affiliation* 1, 5, 6, 8, 14. Immaculata’s fulfillment of these elements is evidenced throughout this chapter.

Institutional Ethics Compliance

Immaculata University is authorized as a post-secondary educational institution in Pennsylvania to award post-secondary degrees and certificates [E2-01].

The National Council for the State Authorization Reciprocity Agreements (NC-SARA) has recognized Immaculata as a participant in SARA [E2-02]. Immaculata University complies with all applicable federal, state, Middle States Commission, programmatic accreditation, interregional and inter-institutional regulations and policies, and communicates changes in accredited status as necessary. The University is transparent in providing truthful and accurate communications. Through a systematic annual evaluation, the University ensures that the public is made aware of how well and in what ways the institution is accomplishing its mission through its Consumer Information webpage: <https://www.immaculata.edu/about/consumer-information/>. The Institutional Federal Compliance Report demonstrates compliance through the eight domains [E2-03].

Ethical Standards for All—Manuals and Catalogs

Central to the structures that communicate expectations for ethical conduct is the Immaculata University Policy

Manual (IUPM). Established in 2012, the IUPM consists of seven volumes that guide institutional policy and practice for all IU constituents. They can be found on the IU Portal **[E2-04]**, making these readily available. Both the Executive Administration and the University Council review the Policy Manuals comprehensively at least every three years and update individual policies as warranted to ensure they remain relevant and accurate. An example of such reviews is evidenced in the spring 2023 communication from the VPAA for Volumes IV and V **[E2-05]**. Updates made in the manuals include footnotes with the date of the revision.

- » **IUPM Volume I: Governance and Administration Policies [E1-01]** includes the University charter and identifies the ethical requirements for IU Board of Trustees members and elaborates the conflict of interest policy (1.4.3.3, 1.4.3.4, 1.5). The policy establishes the fiduciary duty of trustees and executive officers of the University and explains the expectations and processes that attach to those individuals' roles in any transactions involving the University. It also requires the annual completion of conflict of interest and confidentiality statements **[E2-06]**. Volume I outlines the scope of institutional standing committees, such as the Research Ethics Review Board (1.7.2.2.9) and the Diversity, Equity, & Inclusion Committee (1.7.2.2.7).
- » **IUPM Volume II: Community Policies [E2-07]** focuses on community-wide policies and details multiple policies to promote fairness, equitable treatment, and respect for diverse communities among faculty, staff, and students. Some of these include the policy on bullying (2.1.3), disability (ADA) policies (2.1.6), diversity and inclusion (2.1.7) and equal opportunity (2.1.8) policies, non-discrimination and anti-harassment policies (2.1.10), and Title IX policies (2.1.17).
- » **IUPM Volume III: Institution-Wide Employment Policies [E2-08]** governs all University employees and provides clear definitions for employee status (3.1.2). It describes employee conflict of interest (3.3.6), personal conduct (3.3.11), disability (3.3.12), and interpersonal relationship (3.3.14) policies, all of which make clear the standards of conduct regarding protection of personal dignity and institutional responsibility.
- » **IUPM Volume IV: Faculty Personnel Policies [E2-09]** specifies the faculty's right to academic freedom (4.6.1.1), due process and treatment policies, and a range of other faculty rights and responsibilities in Sections 4.6 and 4.7. These policies cross-reference many of the policies in Volume II regarding treatment and behavior of all members of the community. Section 4.3 also

reiterates IU's commitment to equal employment opportunity according to law.

- » **IUPM Volume V: Academic Policies [E2-10]** defines institutional policies for curriculum development (5.4), shares considerations for academic disability (5.2), and codifies ethical research practices (5.5). It provides a framework for the University's compliance with the Americans with Disabilities Act (5.2). These policies guarantee firm, clear institutional support for a broadly accessible, ethically sound academic community.
- » **IUPM Volume VI: Non-Academic Student Life Policies [E2-11]** documents rights and responsibilities for IU students regarding Immaculata's commitment to non-discrimination and diversity (6.1.1), freedom of association and inquiry (6.1.3.1), and personal and academic integrity (6.1.3.1.2). The volume identifies honesty and integrity, noted in multiple sections and described in detail, as essential aims of student behavior.
- » **IUPM Volume VII: Business and Financial Affairs Policies [E2-12]** itemizes institutional rules governing the University's standard accounting, budgeting, and finance protocols and investment strategies, including the annual auditing process (7.1.4), receipt and handling of funds (7.1.5), budget policy (7.2), finance policies (7.3), and investments (7.3.4). These policies are more clearly addressed in [Chapter 6](#) and validate the University's ethical management of resources.

The IUPM Volumes inform companion sections of the academic catalogs. Both Undergraduate and Graduate Catalogs (2023-24) **[E1-16; E1-17]** provide extensive guidance on questions of academic integrity and ethical academic conduct. The Undergraduate Catalog **[E1-16, pp. 54-58]** defines academic honesty, elaborates multiple varieties of standards and violations, and provides a detailed description of the process for investigating, reviewing, and adjudicating such actions. The Graduate Catalog **[E1-17, pp. 22-27]** includes the same language.

Additionally, undergraduates at IU have to fulfill an ethics course requirement to graduate; the course may be taken from within the major or through the Theology and Philosophy Department **[E1-16, pp. 50-51]**. Supplementing the catalogs, many programs produce student handbooks, which address specific expectations for students and professionals in the field **[E2-13—E2-23]** and delineate ethical expectations for coursework and experiential learning.

Honest and Open Communication

True to the IU mission of seeking truth and promoting justice, Immaculata communicates thoroughly and

honestly, both within and beyond the institutional community. This is evident in the many regular publications produced by the University's Communications and Marketing and Institutional Advancement teams, as well as other campus offices. Formal communications at IU are clear, concise, open, regular, well-informed, useful, and timely, as evidenced through the letters from the President providing updates about issues that impact the broader University community [E2-24] and beginning of semester emails from the Vice President for Academic Affairs to faculty [E2-25; E2-26].

For the on-campus community, the Communications and Marketing department distributes the *Dome Digest* weekly electronic newsletter [E2-27—E2-30] each Monday to all staff and students during the fall and spring semesters and every other Monday in the summer. It highlights upcoming events, including service opportunities and speaker presentations; provides timely campus announcements; and reiterates existing policy/informational items related to new or extant procedures. Communications of this type proved especially useful during the COVID-19 pandemic [E2-31; E2-32].

Specific populations across campus receive targeted news updates. For instance, the Academic Affairs Office shares faculty accomplishments with the academic community via *News Notes* [E2-33], a biannual electronic publication. The College of Graduate Studies and Research publishes a newsletter, *CGS Insight* [E2-34], distributed to all faculty, staff, and graduate students three times per year and focuses on news specific to the graduate population.

Employees confirm the effectiveness of institutional communication. The 2023 Employee Engagement Survey highlights marked improvement from the 2017 Employee Engagement Survey [E1-64, p. 11], as demonstrated by increases among the ratings for the following statements:

- » “Open communication is encouraged at the University.” 3.59 mean in 2023, 3.13 in 2017;
- » “In general, I believe the University is open with its information and its plan.” 3.57 mean in 2023, 3.14 in 2017;
- » “In general, I am satisfied with the level of communication I receive from the University.” 3.49 mean in 2023, 2.90 in 2017.

While these ratings improvements were statistically significant at the 95% confidence level, the information suggests communication is still an area for improvement, which the President acknowledged at the fall 2023 University meeting when she and IRE shared these results [E2-35].

Beyond the campus, IU alumni and faculty benefit from receiving the *Highlights from the Hill* [E2-36—E2-38] email newsletter, which the Alumni Office sends approximately twice a month with news items about current students, faculty, and staff; Alumni Association administrative updates; networking and professional development opportunities; calendar notices; and more. It is a comprehensive and functional publication that develops alumni as a body as well as keeps them informed of campus news. The *Immaculata* magazine, published semi-annually, allows the University to highlight exciting campus news for the broader IU community, including alumni and other external stakeholders [E1-24]. Additionally, Institutional Advancement disseminates the *Honor Roll of Donors* [E2-39; E2-40] and *Immaculata At A Glance* [E2-41] publications annually to University stakeholders, including students, alumni, employees, board members, donors, and business partners.

Beyond the *Dome Digest* for the internal IU community, IU's Communications and Marketing maintains a regular flow of news and press releases. The department keeps annual news release logs [E2-42—E2-45] and posts news releases on the University's website. The items relate to student accomplishments, curriculum and program developments, assessment results (such as pass rates for certification exams), and events on campus. The Communications and Marketing team shares news items about events on campus as well as campus stories about faculty, students, and alumni. Immaculata's website (www.immaculata.edu) maintains updated information about the University that includes academic programs, admissions, cost of attendance, campus life, and news, further illustrating open and honest communication.

The specialized outreach above supplements the series of University-wide and faculty meetings, retreats, and workshops held throughout the year [E2-46; E2-35; E2-47; E2-48]. These supplements are all in addition to the regular updates provided to faculty and staff in written and digital formats, such as Facebook [E2-49], X (formerly Twitter) [E2-50], Instagram [E2-51], YouTube [E2-52], and LinkedIn [E2-53]. The institutional app, Rafr, also communicates student activities [E2-54]. University Communications and Marketing has published Brand, Editorial, and Social Media Guides for the entire campus community [E2-55—E2-57].

Respect in a Diverse Environment

Reflective of the University mission, Immaculata fosters a climate of respect among its students, faculty, staff, and administration, who represent a range of diverse backgrounds, ideas, and perspectives. The University's degree-seeking student population has grown in diversity in recent years. The percentage of students of

color in the University has increased from 15.7% in 2009, to 24% in 2023, with the average percentage over that period at 22.5% [E2-58].

The University's 2022-2027 Strategic Plan [E1-03] evidences ongoing efforts to retain and increase respect in a diverse environment, especially Strategic Goal 1-D: "Welcome all individuals into a safe and inclusive community that values all identities, celebrates diversity, embraces sustainability, and serves the needs of all stakeholders." For example, to better serve the growing student population and people from all backgrounds across campus, the Diversity, Equity, and Inclusion (DEI) Committee was established in 2018 and became a standing Committee in 2019. This Committee includes members representing faculty, staff, and administration and has included student representatives since spring 2022 [E2-59; E2-60]. The DEI Committee's mission is to strengthen institutional commitment to supporting and encouraging an equitable, inclusive, and diverse community, and they developed an action plan toward this goal [E2-61]. Through thoughtful discussion, regular workshops, and various events throughout the year, the Committee's aim "is to work to ensure that individuals of all backgrounds feel safe, a sense of belonging, and valued at Immaculata" [E1-01, 1.7.2.2.7]. Examples of workshops include the Center for Advancement in Scholarship, Teaching and Learning Excellence (CASTLE) summer reading and discussion groups and diversity awareness training [E2-62; E2-63].

The most recent employee engagement survey [E1-64, pp. 26-28] demonstrates strides in diversity, equity and inclusion, with positive ratings for all six statements evaluating individual acceptance and perceptions of individuals of differing races, religions, gender identities, ethnicities, and abilities. Average aggregate ratings of statements in this category ranged from 4.04 to 4.37 of 5. The statement, "I feel accepted at the University" obtained the highest rating (4.37 of 5). The statement "All gender identities and sexual orientations are valued and respected" increased by 0.35 points from the 2017 Employee Engagement Survey. While there is no single factor that can be directly attributed to fostering this improvement in survey results, the work of the Diversity, Equity and Inclusion Committee has raised campus awareness. The committee's vision encourages, supports, and promotes the cultivation of ever greater unity in diversity, equity, and inclusion [E2-59].

DIVERSITY WELCOMED AND CELEBRATED

The University welcomes and celebrates diversity through many initiatives, student clubs and organizations, and additional resources. Some of the activities include the celebration of Black History Month, Hispanic and Latinx Heritage Month, National Coming Out Day, International Pronoun Day, and Veterans Day, which the *Dome Digest* and other campus

announcements publicize [E2-27]. Student clubs can be found on the University website's campus life section [E2-64]. Samples of such clubs include:

- » **IU for Women:** The purpose of the club is to provide a safe and welcoming environment for every student in the College of Undergraduate Studies, especially women. The club also acts as a go-between to support and empower the communities surrounding Immaculata. Students have a chance to develop their individual character and capacity for leadership through the exercise of promoting women's struggle for equality, representation, and community support on and off campus. Furthermore, this club seeks to inspire Immaculata students to not just promote and support the role of women on IU's campus, but also to carry these values into their future careers and the wider world.
- » **IU for the Troops:** This group raises money and awareness for the Wounded Warriors Project and shows support for veterans as well as current and future service members.
- » **Black Cultural Society:** A club dedicated to promoting diversity, educating people, and uniting people of all races for the common good of the community.
- » **Spectrum:** The purpose of this club is to promote and assist in the education of the student body about the LGBT population. Through educational programming and regular information meetings, the organization educates interested parties in how to be resources to the student body and support of this population.

The University is committed to embracing diversity and supporting diverse populations, and recent survey data shows these efforts to be effective [E2-61; E2-63]. For example, in recent survey responses, undergraduate students report feeling comfortable and accepted for differences in ethnicity, disability, religious beliefs, and gender [E1-60, p. 34]. CUS students report that the University helped them develop a greater understanding of diversity. Resident students also reported the same regarding their experience living in the residence halls [E2-65, p. 11].

Immaculata celebrates and welcomes diversity, and ongoing efforts to promote diversity receive significant support from the institution's leadership through engagement in events, encouraging dialogue and the implementation of new initiatives [E1-55]. The University continues to expand its programming in this area so that the spirit of welcome and belonging characteristic of the sense of community rooted in the IU mission may flourish.

Equitable Grievance Policies

IUPM Volume II [E2-07] provides a clear path forward for resolving grievances should informal discussions with administrative officers not succeed. Section 2.8 defines grievances and informal resolution and delineates the grievance procedures for a student, faculty member, administrator, or staff member. After the parties make efforts at mediation, a formal review hearing takes place. The policies include the composition of personnel at each stage. The IUPM further delineates procedures specific to staff [E2-08] and faculty [E2-09]. The results of the review are communicated to the complainant within 10 days.

Title IX of the Education Amendments of 1972 (Title IX) prohibits discrimination on the basis of sex in any federally funded education program or activity. Title IX [E2-66] details the appeal of a formal resolution and Title IX Office Reporting Summary [E2-67] delineated actions and appeals from fall 2020 to fall 2022. The Associate Dean of Students & Title IX Coordinator, along with the Deputy Title IX Coordinator, informs the complainants of the process by which a complaint will be resolved promptly and equitably.

The Undergraduate and Graduate Catalogs [E1-16, pp. 56-58; E1-17, pp. 23-28] list procedures for the review of academic code of conduct appeals. The student code of conduct non-academic policies related to community standards and student conduct are outlined in the IUPM, Volume VI [E2-11, 6.5, 6.8].

Faculty members are responsible for outlining grading policies to students at the beginning of each course via the course syllabus [E1-32—E1-34]. If a student wishes to question a grade, the Undergraduate [E1-16, p. 68] and Graduate Catalogs [E1-17, p. 35] include procedures for grade appeals.

Federal and state regulations require that colleges enforce standards of satisfactory academic progress for undergraduate students. Financial aid review procedures [E2-68] for students who fail to meet these standards due to extenuating circumstances are listed in the Undergraduate Catalog [E1-16, p. 46]. Students whose financial aid is terminated may appeal the decision to the Director of Financial Aid [E2-69; E2-70].

Immaculata University is committed to providing reasonable academic accommodations to students diagnosed with a disability who are seeking accommodations. Students requesting learning accommodations may file an appeal should they question the accommodation provided or if the University is not meeting the agreed upon learning accommodations [E2-10 - IUPM 5.2]. Students must demonstrate that they have communicated their concerns to the parties involved prior to appealing to the

VPAA/Provost. The student may file a formal complaint following the Immaculata University Grievance Policy outlined in IUPM Volume II [E2-07, 2.8].

Fair and Impartial Hiring Practices

As part of Immaculata University's 2022-2027 Strategic Plan and its aim of being an inclusive community, the University maintains and promotes a fair workplace. Immaculata has an Equal Opportunity Statement on its website that verbalizes the University's commitment to equal employment and educational opportunity regardless of protected status and applies to all terms and conditions of employment [E2-71].

The Diversity, Equity, and Inclusion (DEI) Committee and Human Resources collaborated on a statement in 2022 that HR now includes in all job postings: "Immaculata University is committed to creating a diverse environment and is proud to be an equal opportunity employer. All qualified applicants are encouraged to apply and will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status" [E2-72, p. 2].

Hiring practices for all employees are fair and impartial. Hiring managers write job descriptions clearly to define the needs of the position based on the knowledge, skills, and abilities needed to perform the job, focusing solely on duties that are components of the position [E2-73]. These job descriptions form the basis for advertising, screening, interviewing, and hiring candidates for open positions to help ensure that the focus is on a candidate's ability to do the job and their applicable knowledge, skills, and abilities. Human Resources staff list job openings on the website through the applicant tracking system, Interview Exchange, and send postings to HigherEdJobs.com and sometimes to other sites such as LinkedIn and professional organizations specific to the position. The Human Resources Department's annual plan documents tactics to identify a diverse candidate pool [E1-52, p. 2].

Interviewing and hiring for staff openings is a collaborative process, which helps with fairness and impartiality in hiring decisions. The hiring manager and often the Human Resources Department review applicants, and multiple employees engage in the interview process. Interview questions remain consistent for all applicants to help with fairness and comply with federal and state laws; Human Resources provides sample interview questions [E2-74] and Candidate Evaluation Forms [E2-75]. The IUPM policies are consistent with the Equal Opportunity Statement as described above [E2-08]. The respective vice president and hiring manager approve the hiring of an applicant.

Similarly, the full-time faculty search and recruitment processes employ several practices defined above with particular features relating to faculty positions outlined in the IUPM Volume IV and with the same commitment to equal employment opportunity **[E2-09, 4.3 and Appendix 2B]**. A search committee identifies their top candidate for the position; the Vice President of Academic Affairs officially offers employment.

Fair and Impartial Evaluation Process

The ongoing success and professional development of faculty and staff is an important part of providing a vibrant campus experience to students. Immaculata University requires all non-faculty employees to engage in an annual performance review that the individual employee and manager complete collaboratively **[E2-76; E2-77]**. The form allows employees to reflect on their performance in all aspects of their job. Then managers meet with employees to discuss the form, collaborate on identifying objectives for the coming year, and add comments. Employees and managers then submit performance reviews to the VP of each area for review.

Full-time faculty have a separate evaluation process and criteria **[E2-09, 4.5]**. Faculty evaluate themselves **[E2-09, Appendix 5A]** and employ student assessment **[E2-78]**. IUPM Volume IV provides the foundation for the evaluation areas, which include content expertise, curriculum design, course management, course conduct, and motivation and mentoring skills **[E2-09, 4.5.1.1]**. In addition, IUPM 4.5.1.2 lists the areas of scholarship that comprise facets of evaluation: discovery (research), integration, application, teaching, and artistic endeavor, with examples of how these can be assessed and evaluated. Service is also a component of faculty evaluation, and examples of types of service and ways to assess service are in the IUPM (4.5.1.3.4). Consistent evaluation criteria across these areas help form a comprehensive picture of faculty performance with a fair and impartial evaluation process using a variety of methods to demonstrate faculty's achievement, including student ratings **[E2-78]**, ranked faculty evaluations **[E2-09, Appendix 5A]**, adjunct evaluation forms, a second-year review process **[E2-79]**, a review when applying for promotion and/or tenure, and a five-year professional development review (PDR) once faculty achieve tenure. A committee reviews the PDR and provides feedback to the faculty member.

Fair and Impartial Employee Discipline and Separation

Immaculata University supports the fair and impartial separation of employees through a variety of policies, procedures, and practices. IUPM Volume III **[E2-08,**

3.11] details a multi-step process to address performance issues (excepting dismissal for cause). As part of the progressive discipline process and as deemed appropriate, the manager and HR work together to place the employee on a Performance Improvement Plan (PIP), which outlines usually at least three areas of improvement needed and provides a timeframe (usually 30 days) and regular meetings (usually weekly) when the manager checks in on improvements the employee has made and remaining improvements needed. The PIP provides specific feedback targeted to the employee's performance improvement **[E2-80; E2-81]**.

IUPM Volume III outlines employee dismissal for cause examples (3.11.2.1.2), which are more egregious violations of the policies, ethics, and mission of the University that warrant immediate termination. In compliance with federal and Pennsylvania state law, the University is an "at will" employer, and as such an employer and/or an employee may end the employment relationship at any time with or without cause. Decisions regarding termination of employment involve not only the supervisor but require review and approval, as appropriate, by HR, the vice president for the department area, and/or the president. Managers do not discipline or terminate employees without consulting the above-mentioned departments/leadership and without supporting documentation.

At each stage of full-time faculty evaluation, IUPM Volume IV **[E2-09, 4.5]** outlines opportunities for faculty appeal and input and faculty separation procedures **[E2-09, 4.9]**. At each stage of full-time faculty evaluation, IUPM Volume IV **[E2-09, 4.5]** outlines opportunities for faculty appeal and input and faculty separation procedures **[E2-09, 4.9]**.

Immaculata University maintains Title IX policy and procedures in compliance with applicable federal and state laws **[E2-07, 2.1.17.1]**. These policies and procedures contain notice of non-discrimination (2.1.17.1.2) and ensure coordination with Human Resources in investigation and review of any related complaints brought forth through Title IX. The Title IX and Human Resources offices follow an investigative process (2.1.17.6) that maintains confidentiality to the highest degree possible, prohibits retaliation, and involves multiple interviews/reviewers of the case to ensure impartiality.

All employees can seek counsel and assistance from Human Resources regarding their employment conditions through Immaculata's open door policy as stated on the website **[E2-82]**. Human Resources is committed to creating a safe and respectful workplace environment for employees to raise any concerns they have about their work environment/conditions. Staff and

faculty can also evaluate the organization and provide feedback through the exit interview process [E2-83; E2-84].

Affordability and Accessibility

Financial aid packages include state or federal funds and need-based grants and scholarships that help cover the educational costs for many students. The University also offers non-need-based grants to students without consideration of parent income, looking only at the scholar and their achievements [E2-85—E2-87]. The public Net Price Calculator ensures open and clear communication about what an IU education will cost [E2-88]. The Office of Financial Aid hosts FAFSA workshops, supporting both current and prospective students [E2-89]. Each annual catalog lists tuition and fees [E1-16; E1-17] and on the University website [E2-90—E2-93] (Chapter 4). The University remains transparent on issues of financial aid and tuition costs and provides many resources to support students with their higher education financial needs.

Assessing Ethics and Integrity

The University continuously reviews policies and practices to ensure they maintain relevance and high standards of ethics and integrity. These policies, housed principally in the IU Policy Manuals, provide a vital unified source of information and direction. An example of periodic assessment can be seen in the review and adoption of an updated tuition waiver policy and non-exempt vacation policy; Human Resources refined these policies to provide expanded benefits to employees [E2-94; E2-95].

Summary

Immaculata University establishes clear and specific ethical standards. Communication is frequent and forthright across multiple constituent groups. Parties can present grievances with substantive due process and appropriate protections for the aggrieved. Hiring and evaluation practices for staff and faculty are fair and impartial. Students receive a demonstrably valuable academic experience and support in responsibly meeting their financial obligations. These domains, structures, policies, and organizational elements provide a comprehensive and vibrant framework that establishes and enforces a high degree of truthful and honest behavior by all parties in the IU community.

KEY FINDINGS

- » Immaculata consistently demonstrates awareness, compliance, and continuing commitment to ethics and integrity, as defined by the Standard II criteria.
- » The IU Policy Manuals, reviewed and updated regularly, outline clear and comprehensive ethical

standards for all members of the community, from the Board of Trustees to the student body, in the full range of relevant areas.

- » The University embraces and respects diversity, a commitment which is reflected in the growth of diversity across the student body in the last decade across several key demographics.
- » Immaculata provides institutional publications (IUPM or catalogs) with policies to manage conflict, including grievance procedures, Title IX appeals, academic code of conduct appeals, financial aid reviews, and learning accommodation appeals.
- » The IUPM establishes fair hiring and employment practices with built-in checks and balances, as well as clearly outlined separation procedures. Exit interviews provide an additional opportunity for employees to give the University feedback on work environment, job satisfaction, benefits, etc.
- » Immaculata provides annual performance feedback and evaluation opportunities for faculty and staff. Faculty also have multiple avenues to get feedback from numerous sources of students, their peers, and appropriate committee members (for tenure considerations).
- » Finally, IU supports affordability and accessibility through fair pricing that resists tuition increases and promotes responsible stewardship of resources. The Financial Aid Office educates IU students to make them aware of their current and future financial obligations and to help them make informed decisions about their educational investment.

CURRENT INITIATIVES

- » The Diversity, Equity, and Inclusion Committee members continue to support and expand DEI initiatives across various constituency groups through campus-wide sharing of the DEI plan and development of additional programming.
- » Human Resources reaches out to various organizations to enhance recruitment of diverse employees.

FUTURE DIRECTIONS

Responding to the Institutional Priorities (IP), Strategic Plan (SP), and drive for continuous improvement, the evaluation of Immaculata's adherence to Standard II's criteria led to the following improvement/innovation:

- » Acknowledging the increased discourse nationally regarding academic freedom, the University will investigate a mechanism to address academic freedom-related topics associated with the policy stated in IUPM Volume II (IP 1; SP I.4 and IV.4).

Chapter 3: Standard III – Design and Delivery of the Student Learning Experience

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

Standard III – Criteria Mapping

CRITERIA	HEADING
1	<i>Academic Offerings; Design and Development of Online Curriculum; Delivery through Community Collaboration and Strategic Partnerships; Delivery through Teaching and Learning Innovations and Strategies</i>
2A-D	<i>Faculty Committed to Excellence; Academic Offerings</i>
2E	<i>Faculty Committed to Excellence</i>
3	<i>Academic Offerings</i>
4	<i>Academic Offerings; Design and Development of Online Curriculum; Delivery through Community Collaboration and Strategic Partnerships; Delivery through Teaching and Learning Innovations and Strategies</i>
5A-B	<i>Undergraduate Core Curriculum</i>
5C	<i>Does Not Apply: Immaculata is a US institution.</i>
6	<i>Graduate Student Opportunities & Research; Faculty Committed to Excellence</i>
7	<i>Does Not Apply: Immaculata does not use third-party providers as defined by MSCHE.</i>
8	<i>Assessment of the Design and Delivery of Student Learning Experience</i>
ROA 2	<i>Federal Compliance Document</i>
ROA 9	<i>Assessment of the Design & Delivery of Student Learning Experience</i>
ROA 10	<i>Assessment of the Design & Delivery of Student Learning Experience</i>
ROA 15	<i>Faculty Committed to Excellence</i>

Overview

Guided and informed by its mission, Immaculata supports students in a learner-centered environment that promotes academic achievement, leadership development, and societal awareness fostering lifelong service. It does this through its staffing, programming, and services. Faculty are prepared to engage students with rigorous learning experiences that promote a synthesis of learning consistent with higher education expectations. The undergraduate core curriculum serves as the foundation of a liberal arts education that fosters student growth, development, and innovative thinking across diverse disciplines. Graduate students engage in advanced academic learning and research opportunities. During students' educational journeys, the University offers them resources, support, and opportunities for academic progress and future professional success consistent with their goals.

Immaculata University meets the requirements of Standard III, its eight criteria, and *Requirements of Affiliation* 2, 9, 10, and 15, as described in this chapter.

Faculty - Committed to Academic Excellence

The University employs qualified faculty and academic staff who design, deliver, and assess student learning experiences consistent with its mission, relevant to societal needs, and appropriate to higher education.

FACULTY APPOINTMENT

The University articulates expectations for its faculty positions, emphasizing the importance of effective teaching, support of students through availability and advisement, service within the academic community, and scholarly inquiry. IU is an equal opportunity employer, and procedures are delineated in the IU Policy Manual for the search and appointment of

qualified ranked and adjunct faculty [E2-09, 4.3, p. 8-10].

The University strives to provide sufficient faculty to meet educational needs. Full-time faculty numbers have demonstrated a steady increase, from 82 full-time faculty in fall 2020 to 86 full-time faculty in fall 2023. This increase is a direct result of department requests to meet programmatic needs [E3-01; E3-02]. The number of part-time faculty has fluctuated over the years to meet the needs of course coverage and content expertise. The total number of instructional staff is in line with comparable institutions [E3-03, Figure 23]. Prudent balance of need with financial resources allows Immaculata to maintain an average 10:1 student to faculty ratio [E3-04].

To initiate a full-time faculty new hire, including replacing departing faculty and adding new positions, the department chair/program director, the college dean, VPAA/Provost, Vice President for Finance and Administration and the President review the process and take budget implications into consideration. Procedures to support the hiring process are outlined in [Chapter 2](#). Department/division faculty, deans, and the VPAA/Provost participate in an inclusive hiring process, consisting of various interviews and a teaching presentation, ensuring the hiring of highly qualified faculty.

Adjunct faculty are hired on an as-needed basis. Candidates are selected based on their expertise, academic credentials, and successful interview with the department/division chair, program director, and full-time faculty members, as appropriate [E3-05].

FACULTY ORIENTATION

The VPAA/Provost creates a sense of inclusion and welcome through the annual faculty welcome breakfast that kicks off the new faculty orientation process. All full-time faculty are invited to share a sense of community through fellowship [E3-06]. Administrative staff explain academic procedures to all new University full-time faculty [E2-09, 4.3.4], which include available campus resources, University structure, faculty expectations, and presentations from Academic Assessment, Curriculum and Instruction, Learning Support Services, Gabriele Library, Career and Professional Development, the Counseling Center, and the Center for Advancement in Scholarship, Teaching, and Learning Excellence (CASTLE) [E3-07; E3-08]. Academic Technology Services offers faculty an overview of the technology resources across campus. New Employee Mission Orientation includes the history, heritage, and mission of Immaculata University, providing an immersive introduction to the spirit of the University [E3-09; E3-10]. CASTLE and the Academic Affairs Office continue a faculty member's first-year

orientation with a comprehensive program that includes a series of workshops on topics relevant to their role [E3-11]. In the fall 2022 survey, 100% of the faculty rated the orientation day as helpful [E3-12].

Academic Affairs offers meetings for adjunct faculty in the fall and spring semesters to provide orientation to the University for new faculty, and institutional updates for all adjunct faculty. The program includes meeting department/division faculty and covers such topics as the importance of adjunct faculty to the University, the centrality of mission, the use of technology to enhance course delivery and learning experience for students, and the assessment of learning outcomes. There is also time allotted for open forum discussion [E3-13; E3-14].

OPPORTUNITIES, RESOURCES, AND SUPPORT FOR PROFESSIONAL GROWTH AND INNOVATION

In addition to faculty orientation, IU provides faculty with targeted training in various areas. Immaculata University has been an active State Authorization and Reciprocity Agreement (SARA) institution since December 2018 and agrees to ensure that faculty responsible for delivering the online learning curricula and evaluating the students' success in achieving the online learning goals are appropriately qualified and effectively supported (Interregional Guidelines for Distance Education) [E3-15]. Part of the University's response to this requirement is its mandated institution-wide faculty training, effective spring 2019, requiring IU faculty (full-time and adjunct) to complete training about online instruction before they teach. The training, offered through IU's learning management system (LMS), Moodle, includes two courses: 101: Online Course Facilitation and 102: Introduction to Moodle, for which faculty achieve completion badges [E3-16].

New faculty are encouraged to schedule one-on-one training sessions with the Office of Online Learning for additional assistance with Moodle [E3-17]. The Office of Online Learning compiles data on common questions or concerns to adjust the Moodle platform itself. A recent example of this is the design of the new version of Moodle, launched in December 2023, which addresses student time management, accessibility, and ease of use issues. Faculty were provided with training opportunities and a sample platform to experiment with prior to the launch [E3-18]. Complementing these academic-based opportunities, faculty also participate in institutional training, such as Title IX workshops to ensure students enjoy safe and welcoming academic spaces ([Chapter 2](#)).

FACULTY DEVELOPMENT IN TEACHING AND LEARNING

The Center for Advancement of Scholarship, Teaching and Learning Excellence (CASTLE) supports the ongoing development of IU faculty and encourages their growth as effective educators [E3-19]. Relying on direct faculty outreach [E3-20] and the CASTLE Committee for ideas, CASTLE has helped prepare the annual faculty workshop [E3-21], conducted book group discussions [E2-62], supported education on promotion and tenure processes for faculty, and provided a platform for faculty to share research on their fields and pedagogy. It also provides a platform for the Academy for Metacognition, a faculty grassroots initiative begun in 2012 that fosters higher order thinking through reflections on topics with pedagogical impact [E3-22]. Some examples of CASTLE programming include January 2023 faculty workshop sessions on strategies for student support of reading comprehension as well as best practices for using polling technology to engage students within the classroom [E3-23; E3-24] and CASTLE book discussions to assist faculty serving specific populations, such as minority students and students with learning differences [E2-62]. CASTLE initiatives have generated collegial conversation and greater awareness that encourage faculty to develop innovative learning environments [E3-19].

Beyond CASTLE's resources, IU supports faculty scholarship through the faculty development fund [E3-25; E3-26] as well as grant opportunities facilitated by the Office of Sponsored Research [E3-27; E3-28; E3-29; E3-30]. Faculty scholarship, including recent publications, grant awards, and conference presentations, is celebrated and communicated each term through the publication of *News Notes* by the VPAA/Provost [E2-33].

Self-guided resources support faculty in the effective design and delivery of student instruction. Over the last five years, the Moodle "Faculty Hub" has become a central access point for academic resources, academic advising, technology, and support services, which assist faculty in providing students with a consistent learning experience regardless of instructional modality [E3-31]. The Office of Curriculum and Instruction (C&I) provides and maintains websites that offer forms, links, policies, best practices, training for IU faculty and a visual map of how various hubs are connected and managed [E3-32]. C&I updates the hubs regularly with term-specific resources as needed to represent accurate information and reviews each in detail every summer to ensure all content is accurate. Recent additions include the creation of an academic advising tab and promotion and tenure resources to answer faculty needs. Through the Faculty Hub, faculty have access to the Faculty Resource and Technology Centers, dynamic IU-created

webpages that provide detailed information and tutorials related to course templates and requirements, available technologies, and resources for support [E3-33].

To support faculty teaching, every course receives a Moodle course shell that includes a link for faculty to access the resource page outlining their institutional responsibilities. Faculty use a standard format for course syllabi that, in addition to course requirements and assignments, demonstrates how course learning outcomes align with program outcomes [E1-34; E1-32; E1-33].

Immaculata provides for faculty technology needs in several ways, including smartboards, smart TVs, classroom podiums, or other specialized technology, such as nursing simulation labs, music and graphic arts labs, and exercise science labs, to support field or program-related instruction. The Office of Technology Services (OTS) performs regular hardware and software updates [E3-34], and an Academic Technology Committee (ATC) meets each semester to discuss academic technology needs and policies [E3-35].

FACULTY EVALUATION

Course evaluations are an important part of the promotion and tenure process for full-time faculty [E2-09, 4.5, Appendix 3A, Appendix 4, Appendix 5A]. Students evaluate all course instructors, both full-time and adjunct faculty, by completing the online course evaluation [E2-78]. As part of the evaluation process, faculty encourage students to complete the course evaluations [E3-36]. Three weeks after the course ends, evaluation reports are automatically generated and shared with department/division chairs and course instructors. Course evaluations are essential for evaluating the performance of adjunct faculty in hiring for future course instruction and for instructional improvements responsive to student input.

Full-time faculty participate in an annual self-evaluation, using the Annual Ranked Faculty Evaluation Form [E2-09, Appendix 5A], which is reviewed by the department/division chair or program director and appropriate college dean before submission to the VPAA/Provost. Faculty establish goals in these evaluations, and they review and assess their goals from the preceding year as part of the self-evaluation process.

The Second Year Review allows newly ranked faculty to obtain early feedback on their teaching, scholarship, service, and student advising from a committee consisting of their department/division chair, college dean, and ranked faculty member [E2-09, 4.5.1.6 and Appendix 10A].

Promotion and tenure eligibility and processes follow the written guidelines located in the IU Policy Manual [E2-09, 4.5.1.7]. The review is multi-tiered, involving the department/division chair, college dean, VPAA/Provost, president, and members of the Promotion and Tenure Committee before being sent to the Board of Trustees for review and vote [E2-09, 4.5.1.7.3 and Appendix 8]. Finally, members of the ranked faculty participate in a Professional Development Review (PDR) every five years following their last cumulative review [E2-09, 4.5.1.8 and Appendix 10B].

Promotion and tenure resources, including advice and guidelines for those processes, are on the Faculty Hub [E3-37; E3-38; E2-79]. CASTLE sponsors sessions with a representative from the Promotion and Tenure Committee for new faculty to provide guidance and answer questions about the process [E3-39]. Faculty receive encouragement, starting with orientation, to build and maintain a professional portfolio using their own dedicated Moodle shell [E3-37]. These electronic portfolios are used for second year review, promotion, tenure and professional development review processes, providing a clear structure for the candidate's documentation and allowing the candidate the ability to give each reviewer access to their portfolio during the evaluation period [E3-40].

Academic Offerings

Immaculata is committed to offering relevant and rigorous programming that meets the needs of current and future students. In addition to continuous improvement of existing programs, based on items such as course evaluations, program five-year reviews, and accreditation needs, the University strategically creates new programs. All new programs require departments to demonstrate need and alignment to the mission; in addition, new degree programs must demonstrate market viability using Bureau of Labor Statistics data and similar recognized data sources [E1-58; E3-41]. Recently, new programs have included a Master of Business Administration, M.S. in Higher Education, M.S.N. Family Nurse Practitioner, B.S. programs in Sport and Business Management, Esports and Business Management, Public Administration and Public Health, and an A.A. in Social Services [E2-46, p. 3; E3-42; E3-43; E3-44; E1-59]. Departments have also created several minors, such as Cybersecurity, Data Analytics, Digital Forensics, Environmental Science and Ecology, Financial Planning, Supply Chain Management, Pre-Med, Pre-Vet, and Pre-Law, in response to the needs of current and prospective students [E3-45]. Detailed information about program assessment is provided in [Chapter 5](#).

The University communicates all academic offerings and degree requirements to prospective and current

students using official publications, including, but not limited to, the IU website and University Catalogs [E3-46; E3-47; E3-48; E1-16; E1-17]. If a prospective student is unsure of what to major in, the IU website provides advice on selecting a major [E3-49]. In addition, academic offerings are provided to prospective students through marketing materials and discussed in person at undergraduate and graduate open houses [E3-50; E3-51; E3-52].

Once enrolled, students have access to Degree Works to monitor their progress throughout the degree and the assistance of assigned advisors for any questions associated with their degree completion [E3-53] ([Chapter 4](#)). In 2019, responding to student need for programmatic resources in one easy-to-access location, several departments initiated major hubs in Moodle. The material in each major hub varies, but typically includes program progression information, student handbooks, and other information specific to major completion [E3-54]. As of fall 2023, there are approximately 25 major hubs activated or in development. Additionally, students have access to the Student Hub, located on Moodle, which includes various academic resources for all majors and levels of education (i.e. course sequence sheets, student services, technology resources) [E3-55]. Each of these items helps ensure that students are able to follow degree requirements for timely completion.

DESIGN AND DEVELOPMENT OF ONLINE CURRICULUM

The University offers programs and courses in a variety of modalities, including fully asynchronous, hybrid, and in-person classes. Immaculata has been responding specifically to the growing interest in online learning.

Several undergraduate programs are offered as distance education in an online format, providing flexibility particularly for adult and/or part-time learners [E3-56]. As of fall 2022, 14% of degree-seeking undergraduates were exclusively enrolled in online courses, and another 37% enrolled in at least some online coursework [E3-04]. In addition to the institution-wide resources noted above, graduate education at Immaculata provides programmatic options that respond to adult, post-baccalaureate student needs. Several graduate programs, including athletic training, nutrition, educational leadership, and nursing, employ varied teaching modalities such as online synchronous, online asynchronous, and hybrid classes as creative solutions to adult learner scheduling challenges. As of fall 2022, 43% of degree-seeking IU graduate students were studying exclusively online with another 21% taking at least some online courses [E3-04].

In order to create a consistent and rigorous learning experience across modalities, IU developed the “one

shell model” (OSM). OSM ensures creation of master shells that promote alignment across curriculum for students and faculty, regardless of the modality used. The employment of the OSM approach also ensures that students taking online coursework have continuity in course design and layout. Developed by faculty who are institutionally approved subject matter experts and under direction of the chair/program director, OSM courses employ a standardized template and comply with ADA requirements. The Office of Curriculum and Instruction (C&I) manages the OSM shells. C&I maintains all materials, regardless of course delivery, within the course master shell; the Moodle system exports master shell content automatically into individual course shells each term [E3-57; E3-58; E3-59; E3-36]. The C&I office meets every fall and spring semester with all departments using OSM to review content, identify any course revisions for follow up, address any changes/updates, and discuss issues that could lead to improving course design and the student experience [E3-60].

DELIVERY THROUGH COMMUNITY COLLABORATION AND STRATEGIC PARTNERSHIPS

Immaculata recognizes and leverages relationships throughout the region to build enrollment, provide options for IU students, and create learning opportunities that extend programming beyond Immaculata’s campus.

For Immaculata students seeking graduate study, the University has developed strategic partnerships with academic institutions that provide smooth transition into quality graduate programs not offered by Immaculata. These strategic partnerships generally offer accelerated degree completion, cost savings, and/or guaranteed scholarships [E3-61; E3-62]. Each partnership agreement explains the pathway for progression between programs. Other agreements allow Immaculata to serve undergraduate students from other institutions who wish to continue their studies at Immaculata [E3-63].

Additionally, Immaculata has established mutually beneficial employer partnerships with various organizations to meet the academic needs of their workforce. Tuition discounts for employer partnerships reduce financial barriers for employees [E3-64; E3-65]. Immaculata develops these cooperative programs with other accredited institutions and community organizations in consultation with related departments, and the VPAA/Provost ultimately approves and manages the agreements. The University does not employ third-party services in the design or delivery of its student learning experiences.

DELIVERY THROUGH TEACHING AND LEARNING INNOVATIONS AND STRATEGIES

Immaculata prioritizes innovative teaching and learning in environments that engage students by investing in facility upgrades and new spaces that directly contribute to enhanced learning environments [E1-49; E2-46]. Skilled faculty, using enhanced laboratory and classroom spaces effectively, create vibrant educational experiences. In the Parsons Science Pavilion, students in multiple disciplines use a state-of-the-art Anatomage virtual cadaver dissection table to augment the curriculum [E3-66; E3-67]. Equipped with instruments used in industry and academia, faculty mentor students in required bench research projects in the biology and chemistry labs. Students gain real-life training using specialized technology in the Applied Technology/Cybersecurity Lab to experiment with tasks such as ethical hacking. Immersed in a global context, students monitor real-time data showing live cyberattacks across the world. Similarly, the Business Lab has a stock ticker providing students with real-time market data. Simulations play a key role in several programs, including nursing and athletic training. Recent simulations enable inter-professional learning opportunities, engaging students across varied disciplines in mock casualty events [E3-68; E3-69] and simulated crime scenes [E3-70].

Academic resources are central in supporting the learning experience. With the growing expense of traditional textbooks and the expanding availability of open educational resources (OER), the Office of Academic Affairs, in collaboration with faculty, established a textbook affordability initiative. The ensuing project involved the redesign of 47 courses from employing textbooks to a combination of developer-created content, openly licensed content, and/or OER [E3-71; E3-72]. Funding for this initiative came from Pennsylvania Grants for Open and Affordable Learning (PA GOAL) [E3-30], course development grants designed to support faculty and instructional staff in zero-cost textbook alternatives in lieu of commercial textbooks. As the selected courses serve a wide segment of the University’s undergraduate population, the impact of the shift to OER has a measurable and positive impact on students, many of whom are from underserved populations [E3-72]. One such impact is cost savings for IU students; for example, the 20 courses converted to OER in the first two rounds of the grant saved students over \$81,000 in the first year. The University provides a resource, through C&I, to educate faculty on OER, assist them in selecting OER resources for their courses, and clarify any legal requirements and restrictions to using open content [E3-73].

Innovative teaching strategies do not rely solely on technology. Faculty and students in the Department of Natural Sciences participate in a weekly, one-hour Science Colloquium series each semester. Speakers from various professions address topics such as research, medicine, and career information [E3-74; E3-75], linking the collegiate world of science with the applied fields. A similar example from the humanities occurs in music. Undergraduate students participate in a music convocation class [E1-16, p. 127], providing them with performance opportunities and exposure to emerging topics in the field. The music program also hosts a culminating recital each term [E3-76]. These experiences illustrate ways in which programs seek to build a sense of community, connecting majors to each other, alumni, and the profession.

The IU Undergraduate Honors Program is a multidisciplinary academic community [E3-77]. Students from across all IU majors and programs complete 18 credits within a curriculum of interdisciplinary course offerings; most if not all of these courses also serve as elements to fulfill students' Core and/or major requirements [E1-16, pp. 82-84]. In addition to the required first-year honors seminar and capstone colloquium, recent course offerings include Afghanistan: Crossroads of History, Evolutionary Psychology, War Movies, Schools and Society, and Aesthetics. Complementing the academics, honors program students engage in co-curricular events and activities such as guest speakers and service-learning opportunities in partnership with local and regional charitable organizations. An IU Honors Symposium was established in spring 2023 as an opportunity for honors students to synthesize their learning and demonstrate the work completed in the honors colloquium and share the results with the campus community [E3-78]. The number of students engaging in the honors program has steadily increased over the last five years, from 77 in fall 2019 to 164 students in fall 2023 [E3-79]. The IU Honors Program maintains resources for its students in an online hub and is currently working on the initiation of an online honors journal, *The Labyrinth* [E3-80].

More broadly, all undergraduate students are invited to participate in an annual research symposium, Posters Under the Dome, which allows students from several disciplinary areas to present research posters to the IU community. In April 2023, 123 undergraduate students from 7 departments shared 93 research projects [E3-81]. Similarly, graduate programs require students to participate in capstone project events that celebrate their students' achievements [E3-82; E3-83].

Graduate programs are particularly focused on leveraging field-specific credentials/specializations to help graduate students gain marketable skills. Some examples of this programming include: the MSN

program Nursing Informatic Track [E3-84], stackable credentials (certificates) in health care as part of the M.S. in Health Care Management [E3-85]; Leadership and Management [E3-86; E3-87] as part of the Strategic Leadership M.S.; specialized endorsements, such as Social, Emotional and Behavioral Wellness (PK-12) and STEM Education [E3-88]; and a collaboration between Music Therapy and Clinical Mental Health Counseling to allow Music Therapy students preparation to receive counseling licensure [E3-89].

EXPERIENTIAL LEARNING

Internships, practicums, field experiences, student teaching, and clinical placements are designed and delivered in a manner that allows Immaculata students to apply and expand their learning in a variety of settings. Over 70% of undergraduate majors require students to participate in these experiences as a component of their curriculum [E3-90]. Immaculata has over 331 agreements with health care clinical agencies for clinical placement in the areas of nursing, athletic training, allied health, and clinical psychology [E3-91]. In addition to off-campus opportunities, students participate in internships through the IU Music Therapy clinic and athletic training facility on campus and participation in the GetFit@IU program. These experiences enhance students' learning opportunities and advance their educational goals.

Students also gain practical experiences on campus through various independent and faculty-led research opportunities. Over 50% of respondents to the 2023 CUS Graduating Student Exit Survey indicated that they participated in undergraduate research, which is an increase of 18% relative to the 34% participation level in 2018 [E1-60, Q28].

Immaculata's programs, on the undergraduate and graduate levels, provide learning opportunities that connect the students to the real world. Listed here are a few examples that demonstrate the departments' commitment to innovative responsiveness to making programs effective and impactful for IU learners. Examples include fashion merchandising students visiting the Fashion Institute in New York [E3-92]; the embedding of Forage and FactSet certification credentialing into business classes [E3-93]; biology students' field experiences in Maine with the Audubon Society to assist with classification efforts [E3-94]; speaker series sponsored by the Department of Civic Engagement; and music students' participation in the Immaculata Symphony, a community group aligned with the University.

Immaculata's GetFIT@IU program allows student trainers and exercise science faculty to guide adults with disabilities in customized workouts. Exercise

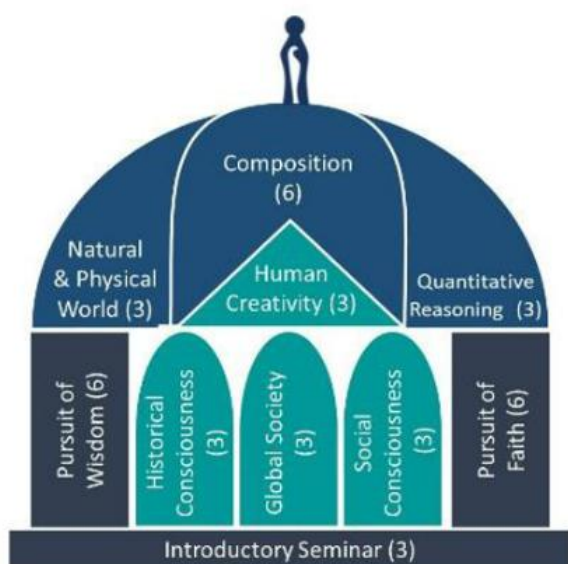
science faculty developed a standardized training course to provide an overview of the GetFIT@IU program for new trainers and provide resources for all trainers regarding exercises, communication strategies, and group activities [E3-95; E3-96]. This innovative and interdisciplinary program is student-led, involving undergraduates from multiple majors (Exercise Science, Music Therapy and Education) and a graduate assistant. Students lead the training sessions, collect data, and present the results of their experiences at internal and external conferences [E3-97].

Undergraduate Core Curriculum

Immaculata's undergraduate core curriculum, or Core, is the basis for its liberal arts education and provides a foundation for the practical skills students develop for service and leadership in an ever-changing and diverse society [E1-16, pp. 49-50].

Figure 3.1

Undergraduate Core Curriculum



The Core fosters students' essential skills, growth, development, and innovative thinking across disciplines. The Core, revised for fall 2019 and inspired by the Catholic intellectual and liberal arts traditions, provides an integrated program of courses in humanities, mathematics, and natural and social sciences [E3-98]. The seven, core curriculum student learning outcomes are listed below:

1. Pursue truth through critical, independent, and creative thinking.
2. Obtain, evaluate, and utilize the data which enables individuals to pursue knowledge and understanding.
3. Communicate proficiently in written, oral, digital, and visual formats.

4. Collaborate effectively in groups in an inclusive and respectful manner.
5. Understand the nature and requirements of moral judgment and ethical reasoning.
6. Recognize how both the previous development of civilizations and contemporary forces have created a complex, diverse, and interdependent world in which they must live as engaged citizens.
7. Recognize the transcendent dimensions of the human person as foundational to a moral vision of society.

The Core consists of three overarching categories: Visions (understanding ourselves and our relationship with God), Community (understanding our relationship with others), and Inquiry (understanding our relationship with the world around us) [E1-16, p. 50]. Together, these seven core learning outcomes offer sufficient scope to draw students into new areas of intellectual experience and expand their cultural and global awareness and cultural sensitivity.

The Core's foundation is a comprehensive introductory seminar, First-Year Seminar (FYS), which focuses on academic engagement and skill building using a wellness-centered approach that includes cognitive, interpersonal, and intrapersonal development. The aim of FYS is to provide an open forum for discussion and collaboration about college transition issues and concerns and to promote greater self-awareness, growth, and understanding as a scholar, individual, a member of the IU community, and global citizen (Figure 3.1). The foundation expands to the two outer pillars, Pursuit of Wisdom and Pursuit of Faith (Vision), which include studies in theology and philosophy. The center of the image, Human Creativity, Historical Consciousness, Global Society and Social Consciousness (Community), aims to heighten students' social understanding by exploring the realm of human existence and ways that persons and communities interact, cultivating concern for the common good and the requirements of justice. The last component of the Core, the dome, encompasses the natural and physical world, composition, and quantitative reasoning (Inquiry), through which courses in English, natural sciences, and mathematics promote intellectual development that enable students to pursue meaningful questions, analyze data, and make sound judgments. The broad range of subjects within the Core offers a sufficient scope to draw students into new areas of intellectual experience and prepares them to engage intellectually with issues outside of as well as within their own academic field.

The core curriculum provides coherence across all undergraduate majors. The Core Program Committee assesses achievement of the Core's learning outcomes

on a five-year cycle, using rubrics based on the AAC&U's Value rubrics [E3-99]. Achievement of learning outcomes is evidenced in the five-year reviews of programs that offer Core courses and is reflected in student exit surveys. When asked whether IU's Core Curriculum enriched their education, 86.7% of CUS graduating students answered yes in 2023; the percentage answering yes to this question has increased over the past five years, suggesting that revision of the Core resulted in a positive response from students [E1-60, Q38]. [Chapter 5](#) includes detailed information about Core assessment.

Graduate Student Opportunities & Research

Faculty provide graduate students with opportunities for research, scholarship, and independent thinking consistent with Immaculata's mission, vision, and core values. Each academic program articulates, in ways specific to the discipline, program learning outcomes/goals that reflect institutional commitment to developing scholarship and evidence-based professional practice. Curriculum, experiential learning, and research opportunities provided by faculty and/or other professionals with credentials appropriate to graduate-level curricula create a foundation for students to be successful in the classroom and society [E1-17].

Faculty expect graduate students to integrate theory and research through experiential learning. All doctoral programs, and nine master's programs require or provide opportunities to complete a practicum or internship. Graduates have reported that experiential learning helped shape their growth and professional development with a rating for May 2023 of 4.32 out of 5 [E1-61, Q7 part J].

Doctoral programs culminate in scholarly dissertation research; master's programs culminate with a capstone, seminar, or comprehensive exam [E2-13; E3-100; E3-101; E2-15; E2-16; E2-21]. Faculty encourage students to present their research to peers, faculty, and industry leaders.

Immaculata University subscribes to the Collaborative Institutional Training Initiative (CITI) for the purposes of providing IU's academic community with access to a research ethics training program. Designed for individuals learning about or engaging in research, this training addresses the history of ethical principles in human subjects' research and the federal regulations regarding risk, informed consent, privacy and confidentiality, special populations, and conflicts of interest [E3-102]. The certificate earned upon successful completion of the nine modules has been incorporated into graduate-level research courses and

is a requirement of all researchers submitting protocols to the Research Ethics Review Board [E3-103].

Assessment of the Design and Delivery of the Student Learning Experience

To ensure an effective student learning experience, all academic departments/divisions engage in academic assessment processes intended to provide an organized opportunity for faculty to reflect on educational practices and identify strategic tactics to achieve programmatic objectives [E1-04].

Student learning outcomes (SLO) assessment allows the department/division to adapt to student learning needs on a regular basis [E1-04]. Using either the institutional format [E3-104] or one designated by external accreditors, departments document annual SLO assessment and submit their finalized plans to the Academic Assessment Hub [E3-105]. Individual departments/divisions design curriculum maps that show where they assess their learning outcomes across courses in their program at least annually [E3-106—E3-109]; full program reviews occur every five years [E3-110—E3-113]. Course evaluations provide regular feedback from students regarding the course's learning environment, achievement of course goals, and effectiveness of course resources [E2-78]. See [Chapter 5](#) for a more thorough exploration of assessment processes and program improvements based on those assessments.

Summary

From their first inquiry throughout their academic program to graduation, well-qualified faculty carefully guide Immaculata students, and a wide variety of academic offices support them to help them reach their full potential at each level of higher education. The average 10:1 student to faculty ratio demonstrates the institution's current adequacy of faculty. The core curriculum, program-specific coursework, experiential opportunities, and research opportunities challenge students to engage in the learning process through critical thinking and ownership of their educational journey. Additionally, Immaculata's student focus yields multiple innovative techniques and approaches that respond to changing student demographics. Offices providing academic support to students and faculty evaluate and revise their practices and resources in response to current and emerging needs. Technology resources enable widespread awareness among students and faculty of academic programs and resources. The University remains firmly committed to each student's success, which is often supported by students' sense of welcome on campus. Optimizing the

success of every student from any background is endemic to the University identity and mission.

KEY FINDINGS

- » Immaculata supports faculty in their design and delivery of student learning experiences from the time they are hired, providing regular and equitable evaluation throughout their professional career at the University.
- » Immaculata clearly and accurately communicates information about academic offerings in official publications to stakeholders.
- » The University apprises students of academic progress and offers sufficient opportunities and resources so they can make informed decisions in their degree progression with support from advisement and online tools.
- » Institutional partnerships allow Immaculata undergraduate students to pursue graduate study with colleges and universities that provide degree programs not offered by Immaculata; these partnerships provide accelerated degree completion, cost savings, and guaranteed scholarships.
- » Immaculata's innovative teaching and learning environments, consistent with higher education expectations, foster a coherent learning experience regardless of modality.
- » Faculty offer opportunities for graduate students' development of research, scholarship, and independent thinking, strengthening their leadership and professional capacity.
- » The University provides a variety of opportunities for undergraduates to engage in

independent research projects and present their findings to the larger community.

- » The IU Undergraduate Core curriculum fosters students' essential skills and holistic formation.

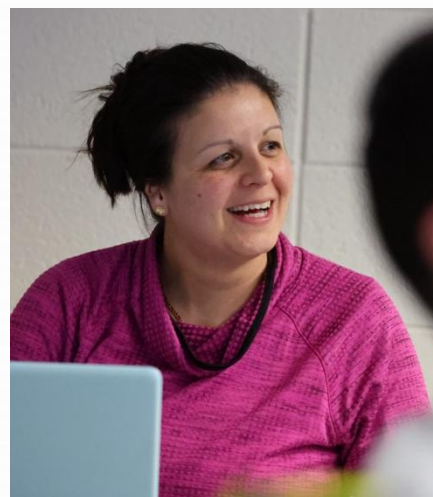
CURRENT INITIATIVES

- » The University continues to identify and seek strategic partnerships with local businesses and universities to serve the ever-changing student population and students' academic pursuits.
- » In addition to evaluating student engagement through assessment activities, the Undergraduate Core Curriculum Committee is committed to leveraging assessment data from the Core to enhance programming.

FUTURE DIRECTIONS

Responding to the Institutional Priorities (IP), Strategic Plan (SP), and drive for continuous improvement, the evaluation of Immaculata's adherence to Standard III's criteria led to the following improvements and innovations:

- » The University will expand use of simulation across campus, as a teaching strategy, for interdisciplinary learning experiences (IP 3; SP IV.5).
- » As generative AI becomes a larger presence globally as well as in learning spaces, the academic area of the University will foster the ethical and effective use of artificial intelligence in the design and delivery of the student learning experience (IP 3; SP IV.5).



Chapter 4: Standard IV – Support of the Student Experience

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

Standard IV – Criteria Mapping

CRITERIA	HEADING
1A	Admissions; Expenses, Financial Aid, & Refunds
1B	Admissions
1C	Admissions; Welcoming New Students; Student Retention Through Support
1D	Admissions; Student Retention Through Support
2	Transfer Credit, Credit for Prior Learning, and Advanced Placement Credits
3	Student Records & FERPA
4	Student Retention Through Support; Residence Life
5	Third-Party Services
6	Assessment of Support for the Student Experience; Summary
ROA 3	Does Not Apply: Immaculata is not a candidate or applicant institution.
ROA 4	See Federal Compliance Report
ROA 8	Student Retention Through Support
ROA 9	Student Retention Through Support
ROA 10	Admissions; Student Retention Through Support; Assessment of Support for the Student Experience

Overview

Immaculata University is committed to the success of each student through high-impact practices and strategic efforts that provide meaningful engagement. The University vision declares, “Immaculata University is a fiscally stable institution as a result of strategic enrollment growth in both the undergraduate and graduate programs and *by focusing on the mission to provide distinctive transformational education to students in the IHM tradition*” (emphasis added) [E1-02]. Immaculata University truly fosters a mission-focused community dedicated to challenging and guiding its students to become their best selves by helping them explore their passions, discover their calling, and build a life of meaning and purpose. These sentiments are echoed through the Strategic Plan [E1-03], which states Immaculata’s academic and co-curricular programs are designed to support strategies that ensure strong retention and graduation rates, while identifying and delivering programming to improve

student opportunities for success within a Catholic learning community.

Immaculata University’s culture of service, strategic planning, and assessment provides a strong foundation for providing and enhancing policies, procedures, and structures that support transparent and accessible admissions, advising, and other critical academic and student life services. The structures defined within the chapter support the University’s mission of “formation of the whole person.”

Immaculata’s value proposition is summarized in the following statement [E4-01]: Immaculata University values each student and empowers them to chart their own course without getting lost in the crowd.

Immaculata University meets the requirements of Standard IV, its six criteria, and *Requirements of Affiliation* 3, 4, 8, 9, 10. Immaculata’s fulfillment of these elements is evidenced throughout this chapter.

Admissions

Immaculata University strives to admit students who demonstrate a capacity for success at the undergraduate or graduate level. Prospective students may access admissions policies and procedures on the University website and within the related course catalog [E1-16, pp. 20-29; E1-17, pp. 13-18]. The Office of Undergraduate Admissions oversees applications and admissions processes pertaining to undergraduate degrees and certificates for traditional freshmen, transfer students, undergraduate adult learners and students in the accelerated second-degree Bachelor of Science in Nursing. Undergraduate admissions policies and procedures include transparent and detailed information for home-schooled, transfer, and international students. The Office of Graduate Admissions oversees admissions for all graduate degree programs, as well as professional certifications and endorsements.

Undergraduate first-time freshman and transfer student applications have fluctuated over recent years but have trended upward over the past decade [E4-02].

Approximately 2,250 applications were processed for fall 2023. In fall 2023, 1,940 first-time freshmen and 308 transfers applied; 1,524 first-time freshmen and 139 transfers received admission offers, and 271 first-time freshmen and 54 transfers enrolled as of October 15, 2023, as full-time students [E4-02]. The yield for first-time freshmen from accept-to-enroll was 17.8%, and the yield for transfers from accept-to-enroll was 38.8%. Overall, the fall 2023 yield for first-time full-time and transfers accept-to-enroll is 19.5% as compared to 14.8% in fall 2022 [E4-03]. The incoming average GPA was 3.51 for first-time freshmen and 3.31 for transfers [E4-04].

Prospective undergraduate students who have a GPA of 2.6 or below, a below-average essay, and/or a below-average letter of recommendation [E4-05] have an opportunity to be evaluated by the Academic Review Committee (ARC). ARC evaluates the academic potential of those undergraduate applicants, a process that requires an interview and an additional essay submission. In fall 2023, six students were admitted through this program. In such cases, students who indicate a potential for college-level work may be granted acceptance supported by the College Success Seminar (CSS) program, which includes additional resources, such as required academic coaching and/or enrollment in a Strategies for Academic Success course during the first semester.

The Office of Undergraduate Admissions engages academic departments in the admission process. Faculty interact with prospective students at open houses [E4-06], accepted student days [E4-07, p. 4],

and shadow visits. For select majors, faculty also participate in the admissions decision process. The Nursing Review Committee [E4-08], Accelerated Second-Degree Nursing Committee [E4-09], and the Committee for the Accelerated 3+2 Pre-Athletic Training program [E4-10] review and make recommendations for admission. The admissions team regularly reviews its policies to ensure that accepted students will experience success, that talented students will be matched appropriately with majors, and that a university education is broadly attainable. Policy changes have included making the submission of SAT/ACT scores optional. Undergraduate applicants, excluding nursing majors and Honors program applicants, were permitted to apply without test scores starting with the fall 2017 admissions cycle. The test-optional admissions policy was expanded to include all majors, including nursing, in fall 2021 due to COVID-19 [E4-11], and all majors have remained test-optional since that time.

The Office of Graduate Admissions works in concert with academic program directors for recommendations for acceptance of candidates who have the capacity to be successful based on their interests, goals, and experiences as described in the admission materials, such as resume, statement of goals, and interview [E1-17, p. 14]. Applicants whose GPAs fall between 2.5 and 3.0 are ineligible for admission as a matriculated student, and in such cases may be considered for non-matriculated status and are advised of additional requirements [E1-17, p. 14]. Candidates applying for programs that require admission interviews, such as the Doctor of Psychology and Doctor of Education programs, are offered the opportunity to interview virtually, improving equitable access to such opportunities. Similarly, prospective students can access program information via virtual information sessions held throughout the year [E4-12].

International prospective students (individuals seeking to attend the University in person on an F-1 visa) are guided by the respective admissions office and provided with the International Student Checklist [E4-13]. The checklist provides requirements for both admission to the University and to obtain the I-20 document. The International Student Services (ISS) staff work with students throughout their application process to answer questions. In fall 2023, only six undergraduate students and three graduate students with F-1 visas were enrolled. The recent decline in the international student population can be attributed to several factors, including the impact of COVID, difficulty obtaining visas in the home country, the shift of some graduate programs to a fully online format, and the design of most graduate programs as part-time study.

Immaculata University strives to provide a superior admissions experience in support of enrollment.

Through an examination of acceptance decisions in 2018-2019, admissions staff identified a need to improve the admissions process. In the Office of Undergraduate Admissions 2019-2020 Annual Plan, a tactic linked to the University Strategic Plan was to launch a customer relationship management system (CRM) to eliminate delays in the decision process by having admissions counselors review applicants while traveling [E4-14]. In 2019-2020 Immaculata University implemented Slate, a robust CRM platform for undergraduate and graduate admissions that interfaces with the student information system, Banner. Leveraging Slate, the University admissions teams have enhanced procedures by providing seamless personalized communications to prospective students and applicants and remote access to applicant data to appropriate University personnel [E4-15—E4-17]. With the pandemic and as of March 2020, this software was critical to operations so that there was no interruption to communication with students and overall responsiveness to applicants. To improve Slate's student-facing component for easier and more impactful engagement, the University launched a search in December 2023 to find a vendor with whom to partner on a project to optimize the Slate portal [E4-18] for all prospective students.

Expenses, Financial Aid, and Refunds

As prospective and current students plan their education at the postsecondary or graduate level at Immaculata University, transparency regarding costs is paramount to ensure they have information readily available to make informed decisions and plan for these expenses.

IU promotes affordability and accessibility through prices generally lower than competitors for tuition, room, and board [E3-03, Figure 8]. Immaculata University did not increase tuition, room, or board between fall 2020 and fall 2022 [E4-19] to help students and their families deal with pandemic-related expenses and higher costs of living. During this same time, FTE enrollment in traditional undergraduate and dual enrollment students increased from 931 in fall 2020 to 1,000 in fall 2022 (Table 4.1) [E4-20].

Table 4.1
Full-time Equivalent (FTE) During Tuition Freeze: 2019-2022

	2019	2020	2021	2022
<i>Traditional Undergraduate Students & Dual Enrollment</i>	882	931	985	1000

Tuition and fees are published on the University website [E2-90; E2-92; E2-93] along with required deposits, associated timelines, payment methods, and detailed refund policies [E4-21]. Immaculata provides full-time traditional undergraduate students with the Net Price Calculator for more individualized planning for expenses and estimated financial aid [E2-88] as well as information regarding meal plan costs [E2-91], housing costs [E4-22] and the published course schedule with course fees [E4-23]. Graduate students receive a published course schedule booklet each term that details expenses and payment information [E4-24, p. 14].

Immaculata University's financial aid process is detailed on the website [E4-25; E4-26]. Students receive extensive support as they work to finance their costs. The Financial Aid Office also educates students and parents by having FAFSA workshops both online and in person to explain the cost of attendance, including room and board, books and supplies, and tuition and fees [E4-27]. The Financial Aid Office communicates official aid packages by listing all expected direct and possible additional expenses with an itemized list of financial aid for all students [E4-28; E4-29]. Financial aid staff inform students about financial aid terms, options, and availability [E4-30; E4-31].

Students who take on federal loans must complete entrance counseling before receiving their federal loans. The entrance counseling explains the loan process, managing education expenses, avoiding student loan default, and repayment options. Students also complete the Master Promissory Note, agreeing to the terms and conditions of the loan and to use the loan funds for academic purposes. Once every year, students receive a loan letter/email that summarizes the loan debt incurred at Immaculata as well as any previous schools attended [E4-32]. Financial Aid staff direct students to the National Student Loan Data System (NSLDS) to keep track of their student loans throughout their studies.

Immaculata University strives to provide students with financial support through scholarships, grants, and graduate assistantships. Immaculata University provides scholarships to full-time undergraduate students [E2-85]. Notably, Immaculata awards its inclusion grant to students from diverse racial, ethnic, and socioeconomic backgrounds with demonstrated financial need, and financial aid staff award housing grants to first-time freshmen with financial need. Immaculata University also provides scholarships and grants to adult learners and graduate students, including but not limited to the Ditoro Scholarship, Vassalotti Scholarship, and Verdiani Scholarship. Graduate students can apply for graduate assistantships that are budgeted for each year,

providing selected graduate students a stipend and tuition waiver [E1-17, p. 48].

The University complies with federal regulations in managing student accounts, including refunding federal aid monies from student credit account balances and publishing clear guidelines on tuition refund schedules for students who drop or withdraw from classes [E4-21]. Posted on the website, this information is also available in the Undergraduate and Graduate Catalogs [E1-16, pp. 35-36; E1-17, pp. 33-34].

In addition, Immaculata continues to enhance fiscal resources through grants, regional partnerships, and strategic alliances as a stated priority in the 2022-2027 Strategic Plan [E1-03]. Such financial support is evident at both the undergraduate and graduate level. Immaculata University works with regional employers to offer tuition discounts for employees [E4-33; E4-34], high school partnerships such as Cristo Rey that provide grants to their diverse population of first-generation and/or low-income students [E4-35], and foundations such as Independence Blue Cross Foundation Healthcare Scholars.

Transfer Credit, Credit for Prior Learning, and Advanced Placement Credits

For prospective and current students, Immaculata is transparent regarding the acceptance of transfer credit and recognizes prior college-level work.

The transfer credit policy is outlined in the Undergraduate [E1-16, pp. 69-70] and Graduate Catalogs [E1-17, p. 14]. Undergraduate students may transfer credits from a regionally accredited institution upon receipt of an official transcript, with an earned grade of C or higher and approval from the advising department. Similarly, graduate admissions staff make graduate students aware of the conditions for transferring credits at the time of admission into a graduate program, including the minimum grade requirement and type of institution from which courses can be transferred. The respective admissions offices work in concert with academic advising to answer questions pertaining to transfer credits. Through the transfer page on the institution's admissions website, prospective students have access to a list of courses pre-approved for transfer [E4-36]. Additionally, Phi Theta Kappa named Immaculata University to its 2023 Transfer Honor Roll in recognition of the dynamic pathways created to support community college transfer students [E4-37].

Following the Council for Adult and Experiential Learning (CAEL) model and recognizing that students may have professional experience, technical training, or

courses from institutions not regionally accredited that may warrant credit toward a degree, Immaculata clearly communicates policies regarding types of credit and the approval process [E1-16, p. 59]. The credit for prior learning (CPL) policy is particularly of service to adult undergraduate students, who rated satisfaction with this service as 4.21 out of 5, 5 being excellent, in the 2023 exit survey [E1-62, Q28].

Immaculata University recognizes acceptable scores on Advanced Placement (AP) tests of the College Board for the eligible number of college credits per test taken. Academic department chairs approve and periodically review AP credit for equivalencies in Immaculata's curriculum. The list of approved courses is outlined on Immaculata's website [E4-38]. The University asks incoming students to submit official AP reports to the Center for Undergraduate Advising for review and transcription [E1-16, pp. 21-22].

Welcoming New Students

As Immaculata welcomes students into Immaculata's academic community, faculty, administrators, and current students share the mission and demonstrate the University's core values. Orientation formats differ based on student population but share a focus on creating a sense of community. New students have the opportunity to meet classmates, engage with faculty, learn about the University and its services, and develop a sense of belonging within the community.

New student orientation (NSO) is a critical step in each student's successful transition into undergraduate study. Undergraduate students are served by the appropriate orientation event, such as NSO for first-time freshmen [E4-39; E4-40], undergraduate transfer orientation [E4-41; E4-42], and adult undergraduate new student orientation [E4-43]. The Center for Undergraduate Advising surveys each incoming student to understand their background, needs, and initial plans prior to the orientation events to aid in advising [E4-44; E4-45]. The Office of Student Development and Engagement reviews feedback from the NSO survey [E4-42; E4-46; E4-47] to enhance the orientation (Chapter 5).

As Immaculata University entered the 2023-2024 academic year, members of Student Development and Engagement prepared a new NSO format to create a more engaging and inviting experience for new traditional undergraduates. Rather than giving the new students just a glimpse of what their first year will be like, everything was tied together in one event, held for four days during the last week in August, highlighting the benefits and opportunities of being an IU student outside of the classroom. More specifically, in this new model the Office of Student Life increased time to

encourage students to meet their classmates and build connections. As part of this change, the Office of Student Life and the Communications and Marketing Department ran an anti-melt campaign from mid-May until the end of August, including a “Meet Your Roommate” event hosted with the Office of Residence Life and Housing in June. Throughout the summer,

faculty advisors communicate with their first-year students regarding course schedules.

First-generation students at Immaculata University represent a significant percentage of the overall enrollment; over the past five years, between 18% and 22% of all degree-seeking students have been first-generation students (Table 4.2) [E4-48].

Table 4.2

First-generation Degree-seeking Students (by College) 2016-2023

First Generation Data	Number of Students Enrolled in Fall Term							
	2016	2017	2018	2019	2020	2021	2022	2023
Traditional Undergraduates [formerly College of Undergraduate Studies (CUS) Enrollment]								
Degree-Seeking Students	900	826	788	855	894	948	948	988
First Generation Students	237	207	184	204	227	228	210	220
% First Generation	26.3%	25.1%	23.4%	23.9%	25.4%	24.1%	22.2%	22.3%
Adult Learners [formerly College of Adult Professional Studies (CAPS) Enrollment]								
Degree-Seeking Students	559	557	497	449	486	415	300	277
First Generation Students	156	150	142	133	127	89	72	64
% First Generation	27.9%	26.9%	28.6%	29.6%	26.1%	21.4%	24.0%	23.1%
Graduate Students [formerly College of Graduate Studies (CGS) enrollment]								
Degree-Seeking Students	942	900	820	790	776	748	735	745
First Generation Students	138	131	124	119	112	100	91	94
% First Generation	14.6%	14.6%	15.1%	15.1%	14.4%	13.4%	12.4%	12.6%
Total Institutional Enrollment								
Degree-Seeking Students	2401	2283	2105	2094	2156	2111	1983	2010
First Generation Students	531	488	450	456	466	417	373	378
% First Generation	22.1%	21.4%	21.4%	21.8%	21.6%	19.8%	18.8%	18.8%

Notes:

- 1) Enrollment data based on student headcount as of October 15 of each respective year.
- 2) First Generation Definition - Students whose parent or parents never obtained a Bachelor's (or higher) degree. Parents could have attended some college.

First-time, full-time freshman retention for first-generation students has been lower than non-first-generation students at Immaculata University for 4 out of 5 years between 2016-2020 [E4-49].

In response, the Center for Undergraduate Advising developed a tactic in their 2021-2022 Annual Plan linked to the University Strategic Plan [E4-50] to develop programming for specific populations and at-risk groups. The First@IU program provides tools and opportunities to help first-generation students have a successful college experience academically, personally, professionally, and socially. The aim of the program is to help first-generation college students feel more engaged and appreciated by the broader Immaculata University community as a means of improving their persistence and personal growth. In the pre-advisement survey for new students in 2022, 69 students expressed interest in learning about resources for first-generation college students [E4-45, Q5]. A team of 11 faculty and staff mentors connected with these students over the course of the year to provide support and encouragement [E4-51]. Students engaged in the initiative connect with other first-gen students, build a

collaborative network, meet mentors from faculty and staff, discover resources to help pay for college, build skills for academic success, feel more encouraged and empowered, and plan for future careers [E4-51]. While this initiative has only begun, fall-to-fall retention of this population was 78.3% as compared with the prior year's cohort with retention of 77% [E4-49]. Immaculata is launching a chapter of Alpha Alpha Alpha (national honor society for first-generation college students) in spring 2024 as another way to highlight and support this population.

The graduate student orientation process begins upon acceptance, at which time students receive pre-enrollment and welcome letters that detail how to access critical services [E4-52; E4-53]. Graduate programs conduct their own orientation sessions through the academic departments, supplemented with pre-registration meetings run through the College of Graduate Studies and Research to ensure proper support as students transition to graduate study [E4-54; E4-55]. In addition to program-specific orientation sessions, August 2023 saw the launch of a new

graduate student orientation, offered virtually, to introduce all students to Immaculata's graduate academic and student services [E4-56; E4-57]. Attendees agreed the orientation was helpful to their transition into graduate study and recommended new graduate students attend the orientation program, as evidenced by 4.5 ratings on a 5-point scale, 5 being "strongly agree." In addition, program hubs housed on the Moodle learning management system serve as centralized locations for graduate students to connect with relevant services throughout their programs. All graduate students are automatically enrolled in the Moodle Student Hub, where they can access information related to academic resources, student services, and the technology center [E3-55].

Immaculata University requires new international students to attend the annual international student orientation meeting. The meeting is designed to support new international students in adjusting to life in the United States and ensures that the students understand their responsibilities as international students [E4-58]. In 2022-2023, the orientation theme was based on the Desmond Tutu quote, "Isn't it amazing that we are all made in God's image, and yet there is so much diversity among his people?" This captured the sense of welcome and belonging Immaculata shares with all students. Staff distribute the international student handbook [E4-59] and review it with students during this meeting. Once international students are enrolled in classes, the International Student Services staff continue their support throughout the school year through individual outreach.

Student Retention Through Support

Immaculata prioritizes the formation of the whole person and student success, operationalizing these priorities through engagement with a vigorous and growing community. In order to grow the community, the 2022-2027 Strategic Plan [E1-03] states the goal to "achieve enrollment goal of 3,000 students and a retention rate above the national average." To ensure a growing community, the strategy within the institutional goal is to "design levels of academic and co-curricular student support strategies that ensure retention and graduation rates above the national average." The areas highlighted in this section reflect the work IU faculty and staff do to support students.

Immaculata proudly reports high retention rates among all populations. Retention is a result of committed University personnel providing students with academic, social, spiritual, emotional, and physical support as outlined below. The undergraduate retention rate from freshman to sophomore year has been nearly 80% or higher for the past five years [E4-60], which is higher than IPEDs comparison group data [E4-61; E3-03, Figure 12], with a 90% one-year retention rate of freshman 2021-2022 student-athletes during the 2022-2023 academic year [E4-62]. Similarly, the retention rate for adult degree-seeking undergraduate students from spring 2023 to fall 2023 is 84.0% [E4-63]. Retention rates at the graduate level are tracked by degree program and overall average retention, resulting in a 93.7% graduate student retention rate from fall 2022 to spring 2023 [E4-64] and an 86.1% graduate student retention rate from fall 2022 to fall 2023 [E4-65].

Table 4.3

Recent Retention Rates for Various Populations of Degree-Seeking Students

	<i>Fall 2022 to Spr 2023</i>	<i>Fall 2022 to Fall 2023</i>	<i>Evidence Sources</i>
Overall Traditional Undergraduate Retention	95.5%	85.1%	E4-66, E4-67
Traditional First-time, Full-time Undergraduates	91.0%	79.5%	E4-68; E4-60
Adult Undergraduate Population	80.2%	73.9%	E4-69, E4-70
Graduate Students	93.7%	86.1%	E4-64, E4-65

Reported percentages are the retention of non-graduating, degree-seeking students.

SUPPORTING STUDENTS ACADEMICALLY

Immaculata University's academic support services include advising, academic coaching, learning support services (consisting of the Math Center, Writing Center, peer tutoring and disability services) as well as the library and career and professional development [E4-71; E4-72].

Academic advising is designed to help students achieve their educational objectives. Every student has an assigned academic advisor. To provide clarity on pathways to degree completion, the Registrar's Office maintains Degree Works, an advising and degree audit tool for students and advisors that is accessible from the MyIU dashboard [E3-53]. The degree audit includes

program requirements such as specific course requirements for majors, concentrations, and minors, GPA and grade requirements, and other programmatic requirements. Advisors from the Center of Undergraduate Advising provide training on the Degree Works tool and registration processes during the First-Year Seminar classes each fall semester [E4-73], while graduate advisors and the academic catalog inform graduate students of this feature [E1-17, p. 34].

At the graduate level, each student is assigned a faculty advisor at the time of acceptance [E4-52]. Faculty advisors are notified by automated email when their graduate advisees register, providing an opportunity to review course selections as compared to program plans and requirements and to promptly address any concerns. Faculty advisors are supported by the Graduate Office staff who provide an additional layer of student services; both advising and Graduate Office services are assessed annually. The majority of graduates from across programs consistently rate their academic advising as effective, with ratings of 4.00 and 3.97 in 2022 and 2023, respectively [E1-61, p.16], with Graduate Office services rated as excellent as reflected by scores of 4.47 and 4.17 in 2022 and 2023, respectively, on a 5-point scale [E1-61, p. 32].

The Center for Undergraduate Advising serves all undergraduate students [E4-74] and directly advises undecided majors and adult undergraduate students. Adult students consistently report satisfaction with their academic advising services overall, specifically advisor availability [E1-62, pp. 25-26]. Full-time undergraduate

students are advised by their assigned faculty advisor. Students consistently considered these advising and registration processes as better than adequate based on ratings of 3.99 and 3.92, respectively, on a five-point scale [E1-60, p. 13].

In addition to academic advisement, the Center for Undergraduate Advising also oversees the College Success Seminar; academic coaching upon referral, request, or probation status; academic skills workshops; the Starfish Early Alert Notification System; the mid-term warning process; the First-Year mentor program; and the academic components of New Student Orientation, including new student registration [E4-75]. Academic skills workshops, such as a series of workshops targeting academic skills development to aid in student success, are responsive to the needs of undergraduate students [E4-76]. In support of all underrepresented students, the center sponsored a workshop during the spring 2022 semester for advising staff and faculty entitled, “Advising Diverse Populations: How to be Inclusive Using Appreciative Advising” [E4-77].

The College Success Seminar class provides students with resources who are admitted conditionally, in particular with a study skills designation. In reviewing data for retention to graduation, the Center staff recognizes an opportunity to explore additional avenues to support these students over their college career as illustrated in Table 4.4 which shows the life cycle through spring 2024.

Table 4.4
Students Completing College Success Seminar Class: Retention Tracked Through Spring 2024

Year	# Enrolled	Successfully Completed SAS/ College Success Seminar Class	Retained/Graduated	Withdrawn	Dismissed
2019	59	58	27 retained/graduated by SP24	25	7
2020	27	26	11 retained by SP24	15	1
2021	27	27	9 retained by SP24	15	3
2022	18	16	9 retained by SP24	5	4
2023	24	24	23 retained	1	0

Starfish is an early alert tool that supports undergraduate student academic success and retention. The system allows faculty to complete student surveys on academic progress and to create a system of notification for student concerns or referrals for various University supports throughout the semester [E4-78]. Faculty use an additional confidential notification for social/personal concerns when they feel a referral to the Counseling Center may

be helpful. These notifications go directly to the Director of the Counseling Center, who contacts the student to offer support. The utilization of the Starfish system continues to evolve since its implementation, with hundreds of flags raised and resolved every semester. For example, in fall 2022, over 500 flags were received and processed [E4-79].

As an additional retention strategy, instructors for First-Year Seminar (FYS) classes administer the College Student Inventory (CSI) to all incoming first-year undergraduate students. The survey furnishes additional information regarding first-year students in relation to their overall risk, academic difficulty, motivation, receptivity to services, and other factors to facilitate connecting students to the appropriate resources on campus **[E4-80]**. After administering the survey, FYS instructors meet individually with the students in their classes to discuss their results. The Office of Institutional Research also compiles the survey results and distributes them to campus offices to provide a better aggregate view of incoming students' strengths and areas for growth and potential need for services. An example of a program that Immaculata implemented based upon the CSI is the First@IU program **[E4-51]**.

Learning Support Services (LSS) encompasses the Math Center and tutoring services for undergraduate students, as well as disability services and the Writing Center for both undergraduate and graduate students **[E4-74; E4-81]**. Upon graduation, students are asked to rate their experiences with these services. Students across populations consistently report satisfaction with these learning support services. Disability services were rated 4.38, 4.27, and 4.50 by CUS, CAPS, and CGS students, respectively, while the Writing Center received ratings of 4.29, 4.23, and 4.46 by CUS, CAPS, and CGS students, respectively **[E1-60, p. 30; E1-61, p. 26; E1-62, p. 32]**.

LSS offers direct curriculum-based support for undergraduate students who need additional assistance in reaching their educational objectives. Tutoring services match peer tutors with undergraduate students who have requested tutoring in a particular class. The Math Center, which consists of both professional/faculty and student tutors, provides undergraduate students with support for various math classes. The number of student visits has varied over the past five years, with a significant decrease during the first year of the pandemic. Usage has increased post-pandemic as demonstrated by the two-year period of 2021-2022 with 697 visits and 2022-2023 with 763 visits **[E4-82]**. Math Center exit survey ratings have been consistently favorable and were 4.36 and 4.55, for CUS and CAPS respectively in 2023 **[E1-60, p. 30; E1-61, p. 26]**.

The Writing Center offers writing support to all students at any point in the writing process. A variety of options are available for Writing Center sessions, including in-person appointments, virtual sessions, dissertation guidance, and workshops **[E4-83]**. Both professionals/faculty and peer tutors staff the Writing Center. In the 2022-2023 academic year, the Writing

Center facilitated 1,726 sessions to support students **[E4-84]**.

The Disability Services Office (DSO) ensures equal access for qualified students with disabilities, encourages self-determination and skill development, and collaborates with all members of the Immaculata community to facilitate an accessible and inclusive campus community for those qualified students. The office has seen an increase in the requests for academic accommodations as demonstrated by the following data: 274 students (2020-2021); 328 students (2021-2022); and 362 students (2022-2023 for first two semesters) **[E4-85]**. After DSO Director and VPAA/Provost assessed the growing need, they implemented a strategy in 2021-2022 that included moving the DSO to a larger space in Lourdes Hall with an expanded area for testing accommodations and peer tutoring while increasing the staff from 1.5 FTEs to 3.0 FTEs. In spring 2024, DSO relocated to the easily accessible and highly visible location of the Gabriele Library with renovated spaces specifically designed to respond to expanding student need and reflective of current trends in service delivery models.

In addition to its traditional role of housing over 100,000 physical resources and providing online access to 85 databases **[E4-86]**, the library continues to adapt its services and space to enhance the quality of the learning environment for students. The library director identified the strategic tactic of evaluating and restructuring the library's physical space to make it more conducive to student and faculty needs in 2020-2021 **[E4-87]**. A physical assessment of the library identified the need for additional collaboration and study space. In response, the first and second floors of the library were updated in summer 2022 with attentiveness to students' new ways of engaging and the innovative, cost-effective use of space and materials.

The Office of Career and Professional Development (OCPD) assists students with career planning, achievement of educational goals and post-completion placements. Ratings for OCPD services have been strong for the past five years. On a five-point scale (5 is excellent), students consistently rated services at or around 4. For example, in the May 2023 graduate exit surveys, undergraduate students rated this office at 4.35; adult professional studies students, 3.88; and graduate students, 4.33 **[E1-60, p. 31; E1-61, p. 32; E1-62, p. 26]**. In 2020 and 2021, students participated in 585 and 625 internships/practicums, respectively **[E3-90]**. Overall, the CUS Classes of 2020, 2021, 2022 and 2023 report post-completion positive outcomes of 92-94% after graduation **[E4-88; E4-89; E4-90; E4-91]**. The 2021 CUS Exit Survey highlighted that 20% of respondents indicated that they did not participate in

experiential education while they were students [E4-92, Q21]. Immaculata identified this data as an opportunity to engage students in career preparation earlier in the curriculum, eliminating a barrier for students. In response, the Office of Career and Professional Development identified a tactic in their Annual Plan linked to the University Strategic Plan to collaborate with the First-Year Seminar Chair and incorporate a career preparation assignment in the seminar [E4-93; E4-94; E4-95] ([Chapter 5](#)).

In the 2023-2024 academic year, Immaculata University is providing support to 28 veterans, military members, and their spouses [E4-96; E4-97]. At both the undergraduate and graduate levels, Immaculata veteran certification officers offer detailed guidance about the process of enrolling in classes and connecting with the appropriate veterans' affairs offices to utilize tuition benefits [E1-16, p. 40]. Additionally, students with military transcripts benefit from Immaculata's generous transfer credit and credit for prior learning policies [E4-98]. Active and reserve duty military members receive assistance from numerous offices on campus, including admissions, student accounts, academic advising, and financial aid.

The Center for Undergraduate Advising conducts exit counseling for undergraduate students who indicate an interest in transferring to another institution. Exit counseling includes instructions on how to officially withdraw from the University [E1-16, p. 64], and how to request official transcripts via the Registrar's Office [E4-99]. Graduate students obtain information through their academic advisors and work with the associate dean in the graduate office to process the official withdrawal [E1-17, pp. 33-34].

SUPPORTING STUDENTS SOCIALLY

Immaculata University actively creates a vibrant campus experience to support the development of all students through student life activities and services in alignment with the University mission. As Immaculata works to keep students abreast of happenings on campus, the University launched a new app in 2018 called Involvio. Involvio allowed students to see all events on campus, including those held by Student Life, Athletics, Campus Ministry, and other offices, while also providing students the autonomy to promote upcoming events and communicate with one another [E4-100, pp. 37-38]. In spring 2023, the Office of Student Life replaced Involvio with Rafr, which was selected based upon the data analytics functionality and ability to share information more effectively with students based upon subpopulations. The new platform will allow for greater insight into what students would like to see on campus. To assess the campus life experience, graduating undergraduates were asked

to rate their agreement with the statement, "I feel Immaculata University has met my expectations socially." The aggregate rating was 3.82 in 2023, 3.79 in 2022, and 3.74 in 2021 (3 being neutral and 4 being agree) [E1-60, Q26]. The new capability within Rafr to assess student interest in activities offered to the campus community is intended to continue this upward trajectory.

A broad array of student activities contributes to an engaging campus life. Upon graduation, most undergraduate students confirmed, with a rating of 4.08 on a scale of 5 (5 being strongly agree), that IU provides a "vibrant academic community" [E1-60, Q26]. This vibrancy is supported by a range of available clubs and organizations [E2-64] as well as a robust activities schedule [E4-101]. Engagement and satisfaction are assessed annually: Honors societies, athletic teams, academic organizations, and Greek social organizations are associated with the most engagement among undergraduates [E1-60, Q40], while some of the most beloved events include Carol Night, campus athletic events, campus ministry events, and class traditions, such as Senior Ball and Cotillion [E1-60, Q36].

The IHM Student Center, which opened in January 2019, is designed to allow all students to gather, host events, and work out while providing a late-night dining option. Clubs and organizations can reserve the multipurpose room for activities, and the center is open to the entire campus for hosting group meetings. Recreational resources in the IHM Student Center include the gaming area, which is home to a pool table, ping pong table, shuffleboard, and Xbox. The building also holds a second campus fitness center featuring state-of-the-art cardio equipment.

Immaculata makes intentional efforts to be inclusive of all student populations. In response to feedback from students, both in surveys and through campus interactions, the Diversity, Equity, and Inclusion (DEI) Office has increased campus outreach, including social media efforts, and organized events that represent numerous community constituents [E2-61]. Annual assessments indicate that Immaculata University's intercultural programming is increasing in its impact with 69% of undergraduate students in 2023 indicating that such programming enriched their education [E1-60, Q39]. Social and multicultural clubs, such as the African American Cultural Society and Spectrum, which is a club that supports and assists in the education of the student body about the LGBT population, offer several events each year to support and engage students [E4-102; E4-103], as does the DEI Office [E1-55]. In assessing these initiatives annually, one student remarked, "there was a good advancement from the DEI office in diversity

awareness this year in terms of Black History month, women's history month, and general education on LGBTQIA+” [E4-104, p. 39]. Undergraduate students in the Exit Surveys agree that individuals with differences in ethnicity, sexual orientation, and gender are respected at Immaculata University with ratings of 4.21, 4.20, and 4.16, respectively, on a 5.0 scale in 2022 [E4-104, Q25] and ratings of 4.25, 4.15, and 4.23 of 5 in 2023 [E1-60, Q25].

In addition, Immaculata University offers several opportunities for students to engage in activities for the arts, including Chorale, Concert Band, Symphony Orchestra, Chamber Choir, Jazz Ensemble, and Cue & Curtain Theater productions [E4-105; E2-64].

While the nature of graduate student life is inherently different, students pursuing graduate education have numerous avenues for participation in activities outside of the classroom. While many opportunities are directly related to specific academic departments, all students are welcome to become involved in campus-wide programming. To encourage engagement among peers and the graduate staff, the Office of Graduate Studies regularly hosts “Welcome Week” every fall semester and “Student Appreciation Week” in the spring semester. Graduate staff invite students to the office for refreshments and to learn more about campus services. The graduate student newsletter, *Insight* [E2-34], keeps students informed of available opportunities.

In addition, graduate students nominated by academic department chairs/directors may participate in the Graduate Student Advisory Board, where they engage in open discussion about student and academic life and assist with disseminating relevant campus information to their peers [E4-106]. The advisory board has been instrumental in providing feedback to inform various initiatives, such as the development of the graduate new student orientation, the content of the *Insight* newsletter, and the graduate student appreciation week. In addition, they have served as a focus group for the most recent strategic planning process.

SUPPORTING STUDENTS SPIRITUALLY

Immaculata University's Campus Ministry is a spiritual home for all students, as stated in its mission. The IU community is rooted in the Catholic tradition and the heritage of the IHM Sisters, inspired by the life and charism of Saint Alphonsus Liguori, Mother Theresa Maxis, and Father Gillet. Members of the IU community grow in relationship with God, self, and others through service, prayer, retreats, and fellowship. Students are welcomed and encouraged in Campus Ministry, regardless of religious identity. The renovations of the current Campus Ministry suite have created a multi-

purpose, welcoming space. Through robust programming [E1-50], Campus Ministry helps students to explore spirituality, nurture faith, engage in service, practice social justice, form community, and enjoy fellowship ([Chapter 1](#)).

SUPPORTING STUDENT WELLNESS

Student wellness is a critical component of student success. The Student Wellness Center offers health care, individual and group counseling services, educational programming, and crisis intervention for all student populations [E4-107]. Satisfaction with these services is assessed annually with each graduating class. Both traditional and adult student populations consistently report moderate to high levels of satisfaction over time [E1-60, Q19; E1-61, Q12; E1-62, Q29]. The NSO program introduces these services to undergraduates, while the CGSR *Insight* Newsletter includes regular updates for graduate students from the Student Wellness Center regarding availability of services [E2-34]. The programming offered to students includes monthly pet therapy sessions, flu shot clinics, and a variety of topics related to wellness as referenced in the 2022-2023 offerings [E4-108]. The center's staff collaborates with student groups, and student feedback often guides the programming and educational offerings.

Counseling services provide a critical resource for student success and well-being. In addition to wellness activities, counseling services include individual and group therapy. The number of students using services rose significantly from 2021-2022, from 193 students served with 1,335 clinical hours to 205 with 1,742 hours [E4-109]. In the fall 2023 semester alone 106 students have used these resources with 763 clinical hours. Students may take advantage of counseling services at no additional cost. In addition to on-campus services, the Director of Counseling Services has connections with local medical centers, the Domestic Violence Project, Eating Recovery Center of America, and crisis intervention centers to provide students with the best alternatives for supplemental supports [E4-110; E4-109].

SUPPORTING STUDENT PHYSICAL HEALTH

Immaculata University's intramural program and fitness center provide its student body with opportunities to stay fit while promoting positive social interaction. The intramural program [E4-111] offers a variety of sports to the Immaculata University community, including month-long leagues, night-long tournaments, and full days of competition, and it affords many educational opportunities, such as teamwork, leadership, problem-solving, and competition. The University encourages student involvement and recommendations for new

events to sponsor. In 2022-2023, Immaculata University added two events based upon student demand. In response to requests garnered by Student Development from the student body and athletes [E4-112—E4-114], IHM Student Center fitness facility hours have expanded to include evenings and weekends.

Athletic team membership and engagement is an integral part of student life at Immaculata University, a member of the NCAA Division III and the Atlantic East Conference with 21 varsity sports:

<https://gomightymacs.com/>. A total of 40.5% of the first-time, full-time freshmen in fall 2022 were student-athletes [E4-115]. The institution is committed to academic success and views athletic participation as part of the educational experience through a standard policy on athletics participation and eligibility [E4-116]. The Assistant Director for Academic Support Services and Compliance meets weekly with representatives from academic advising to monitor student-athlete success in the classroom. The primary aim is to assist student-athletes in their transition to the collegiate environment and to help them better understand the academic and athletic demands they will encounter. Study hall opportunities are offered at various times on a weekly basis, and coaches encourage attendance [E4-117]. IRE annually assesses student-athlete experiences for each athletic team, including experiences with coaches, training, facilities, and supporting offices [E4-118], and the Athletic Director meets with each team's coaching staff to discuss assessment survey results. The one-year retention 2022-2023 for non-graduating student-athletes was 89%, which includes an 84% retention rate for freshmen [E4-115]. In addition to high retention rates, student-athletes boasted an overall grade point average of 3.33 in fall 2023 [E4-119]. As a unit of Student Development and Engagement, the Department of Athletics and Recreation follows principles and procedures, consistent with University practice, in its approach to supporting student-athletes.

Residence Life

Residence Life and Housing focuses on community development and civility, growth of individual students, and promotion of academic success. Residence halls provide students with opportunities to build relationships through community boosters, one-on-ones with Resident Assistants, and community meetings. As a result of these programs, the University's housing capacity reached its highest percentage in the last two years [E4-120]. Results from the 2022-2023 residence life and housing survey stated that 81% of non-graduating respondents planned to live on campus during the 2023-2024 academic year, indicating a consistent interest in living

on campus [E2-65, Q37]. In 2023-2024, residency in University housing reached capacity. To respond to the increased interest and current dorm capacity, the President announced in October 2023 that the University plans to renovate an area of campus by fall 2024 to meet the housing demands [E4-121].

Residence Life provides opportunities for current students to apply for paraprofessional positions such as Resident Assistants. These students encourage residents to get involved on campus and help offer a safe living space within the community [E4-122].

Student Records & FERPA

The Registrar's Office is responsible for ensuring privacy and protection of student records according to the Family Educational Rights and Privacy Act (FERPA). The University requires all official electronic correspondence to be sent to students via their Immaculata University email account; photo identification when students request information and services in person; and student submission of the Enrollment/Degree Verification Request form [E4-123] to grant records access to a third party. Policies on student privacy rights conform to FERPA requirements and are detailed in Immaculata University's Policy Manual [E2-07, 2.1.5], available in the University portal.

Immaculata University conducts ongoing FERPA training. For example, during the fall 2022 semester all faculty and adjunct instructors engaged in FERPA training to support these policies [E4-124; E3-14].

Immaculata University provides information to students regarding their rights pertaining to student records, including the process for students to review and/or amend their hard-copy records; their right to the nondisclosure of non-directory information unless prior consent is given, along with the exceptions to that right; and their avenue for filing a grievance against the University in the event of alleged failures to comply with FERPA [E4-125]. The University portal houses the FERPA Release Form students complete to authorize sharing of confidential information by party and information type [E4-126].

Third-Party Services

Immaculata University does not outsource any of its educational programming. The institution contracts with Follett for the Campus Store. Follett manages the campus bookstore, which includes a sundry shop along with on-campus and online access to purchasing textbooks, e-books, and Immaculata apparel and accessories. Parkhurst food services offer students nutritious, diverse dining options. Parkhurst's scratch

cooking methods focus on unprocessed ingredients and healthy meal options.

Most recently Immaculata contracted with OculusIT for technology support, originally to provide help desk, security, threat management, and data cloud services. The University expanded the partnership with OculusIT in July 2023, enhancing the Information Systems group by adding service and support for essential systems—including Banner and Slate—and other systems that integrate with the essential systems. The President endorsed this expansion initiative in her commitment to the continuous improvement of systems, services, and technology ([Chapter 6](#)). The services and contracts are reviewed regularly by the Vice President for Finance and Administration as well as the respective vice presidents seeking new collaborations. All contracts are subject to Immaculata University's Policy Manual VII Business and Financial Affairs Policies **[E2-12]**.

Assessment of Support for the Student Experience

Student feedback obtained from several surveys—including but not limited to surveys for New Student Orientation, Graduating Exit Surveys, First Destination Survey, and Student Development and Engagement surveys—aid in assessing students' perspective of services. The surveys, in addition to graduation and retention rates and admissions yield data, provide insights as units develop tactics with their annual plans. Completion of and progress within the annual plans demonstrates the University's assessment of student support services. The University administers these plans according to the annual planning processes outlined in the Institutional Effectiveness Plan **[E1-04]**, which are guided by the Strategic Plan **[E1-03]**. Units review their proposed actions, report on completion, and submit these reports to appropriate supervisors and to members of the Executive Administration who provide feedback and analysis to their staff.

Assessment findings reveal many positive outcomes in supporting the student experience. As the data documents, students make consistent use of services and report a positive perception of their experiences. Staff are responsive to identified needs as illustrated by increased staffing in LSS, expanded services as illustrated by First@IU, updates to facilities to better accommodate increased needs as illustrated by the development of additional space in residence halls, and additional support for student mental health.

Summary

One of Immaculata's hallmarks is the extensive support services provided to students. Staff members supporting each of these areas possess credentials and professional experience commensurate with their roles and responsibilities. Retention and graduation rates as well as graduate exit surveys document that students have a sense of belonging and that the University's services meet their needs. Student success and enrollment continue to be a priority in today's higher education landscape. In response, IU has taken several steps to enhance these outcomes, including the implementation of Slate. Such steps allow for increased capacity for the admissions teams to engage prospective students and place a greater focus on retention. IU has expanded student support programs and activities, such as the addition of the IHM Student Center, the expansion of Learning Support Services, and programming within the Diversity, Equity, and Inclusion Office. Immaculata continues to show its commitment to student success, evidenced across programming and in the 2022-2027 Strategic Plan ([Chapter 1](#)).

KEY FINDINGS

- » Admissions processes are clear, consistent, and supportive, providing ample opportunity to engage with and guide prospective students. Advances in the use of technology, such as Slate and personal engagement across colleges and stages of admission, demonstrate commitment to supporting students and their success from their first encounter with the University.
- » The institution seeks to support students in financing their education through cost containment, financial aid packages, scholarships, grants, and financial aid counseling.
- » Credit evaluation and opportunities to recognize and accept alternate learning experiences for credit are based on solid and consistent principles that both uphold the academic integrity of IU programs and support students' ability to optimize their learning from other sources in their pursuit of IU degrees.
- » The University designs welcome programs for new students according to each student population. These programs reflect the University mission and core values.
- » Immaculata maintains a high retention rate across student populations, supported by efforts to engage students academically, socially, and spiritually, both within and beyond the classroom experience. Programming specific to diverse populations lends additional

strength to the University commitment to development of the whole person. The subpopulation of athletes shows high retention rates.

- » IU employees maintain student records scrupulously, and all appropriate faculty and staff are trained in FERPA guidelines.
- » Facilities upgrades support an innovative environment for the development of the whole person, responding to the needs of evolving student populations.
- » Exit surveys, annual surveys, and formal and informal assessments inform decision-making to create a vibrant student experience.

CURRENT INITIATIVES

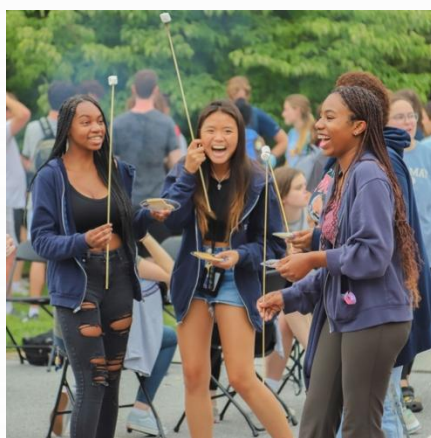
- » To address the unique needs of first-generation students, the First@IU initiative was launched in fall 2022. This year, Immaculata is developing additional programming to support first-generation students, including a chapter of the national first-generation honor society. Assessment of initiatives will help determine other opportunities for meeting these students' needs.
- » With the increase in housing interest, University residence halls reached capacity in fall 2023. To address the need for additional residential space, the Executive Administration analyzed available space on campus and developed a creative solution to increase capacity through relocation of certain offices and refitting of spaces. Renovations are expected to be completed for fall 2024.

- » Addressing the need to optimize technology resources, the University is in the process of engaging a vendor to lend expertise and counsel in the creation of a more engaging and informative student portal for the existing Slate product. The goals are to help Immaculata leverage the tool's potential to support the recruitment, application, and onboarding of all IU student populations, and to ensure the applicant experience is in line with the institution's area competitors.

FUTURE DIRECTIONS

Responding to the mission, Institutional Priorities (IP), Strategic Plan (SP), and drive for continuous improvement, the evaluation of Immaculata's adherence to Standard IV's criteria led to the following improvements and innovations:

- » The culture of institutional assessment is visible throughout campus; however, it is noted that an expansion of assessment measures of co-curricular activities could provide additional information on student growth and development (IP 1; SP II.3 and III.3).
- » With the expanding presence of diverse populations, Immaculata will implement direct assessment measures examining student success and will design responsive strategies so that the University can serve all students, consistent with the mission (IP 1; SP III.3).
- » To maximize developments in technology impacting the student experience, the institution will explore and support initiatives responsive to change (IP 3; SP II.3, III.4, and III.5).



Chapter 5: Standard V – Educational Effectiveness Assessment

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

Standard V – Criteria Mapping

CRITERIA	HEADING
1	<i>Assessment at Immaculata; Academic Assessments: Overview of Processes; Campus-wide Assessment</i>
2A	<i>Academic Assessments: Overview of Processes</i>
2B	<i>Assessment at Immaculata; Academic Assessments: Overview of Processes</i>
2C	<i>Academic Assessments: Overview of Processes</i>
3A	<i>Assessment at Immaculata; Academic Assessment in Action: Case Studies; Campus-wide Assessment</i>
3B	<i>Assessment at Immaculata; Academic Assessment in Action: Case Studies</i>
3C	<i>Assessment at Immaculata; Academic Assessment in Action: Case Studies; Campus-wide Assessment</i>
3D-F	<i>Assessment at Immaculata</i>
3G	<i>Assessment at Immaculata; Academic Assessments: Overview of Processes; Campus-wide Assessment</i>
3H	<i>Assessment at Immaculata; Campus-wide Assessment</i>
4	<i>Does Not Apply: Immaculata does employ third-party assessment services.</i>
5	<i>Academic Assessments: Overview of Processes; Educational Effectiveness: Evaluating the Assessment</i>
ROA 8	<i>Assessment at Immaculata</i>
ROA 9	<i>Department Level Student Learning Outcome (SLO) Assessment; Undergraduate Liberal Arts Core Assessment</i>
ROA 10	<i>5-Year Program Reviews; Departmental Annual Planning; Educational Effectiveness; Evaluating the Assessment</i>

Overview

Immaculata University's departments, divisions, and colleges have articulated clear educational goals that align with the University's mission of "formation of the whole person for leadership and service," encompassing both academic and extracurricular student engagement. Immaculata maintains a robust culture of regular, multi-faceted assessment of its programs' educational effectiveness.

Assessment of student learning and achievement demonstrates that Immaculata's students have accomplished educational goals consistent with not only the institution's mission, but also students' programs of

study, degree levels, and appropriate expectations for higher education. The University uses assessment results to further innovate in teaching and learning environments. In addition, the University conducts periodic evaluation of its educational effectiveness assessment processes. Immaculata University meets the requirements of Standard V, its five criteria, and *Requirements of Affiliation* 8, 9, and 10.

Assessment at Immaculata

Immaculata uses several methods to assess educational effectiveness, including annual planning at the institutional and departmental level, 5-year department/program assessments, Core undergraduate

learning assessment, and accreditation standards at the institutional and programmatic levels. These processes are outlined in the Institutional Effectiveness Plan (IEP) [E1-04]. Academic programs with discipline-specific accreditation submit several interim reports to their accreditors in addition to self-studies to maintain accreditation [E5-01]. Academic programs requiring licensure, such as the pre-licensure BSN [E5-02], various education certifications, [E5-03; E5-04; E5-05], and the PsyD program [E5-06], maintain pass rate records to verify compliance with accreditors and to confirm effectiveness of programming. Academic governance policies and procedures ensure consistency in assessment across programs, degrees, and the institution. Immaculata disseminates assessment best practices, standards, and results across the institution and with stakeholders. The University publishes key performance indicators, including retention rates, graduation rates as well as job placement data on the University website's Consumer information page:

<https://www.immaculata.edu/about/consumer-information>

Immaculata offers assessment support institutionally through initiatives such as training meetings to help each unit complete its annual planning process in alignment with the University Strategic Plan. In those meetings, campus office/department leaders are invited to ask questions and engage in conversation as they develop long-term strategic tactics to achieve the goals of the Strategic Plan [E5-07]. Immaculata's leaders share results of assessments at University meetings [E2-35] and discuss them in faculty development programming [E5-08], allowing for collegial collaboration. Results also allow for assessment and improvement of pedagogical practices and identification of new initiatives for engaging students with innovative learning experiences (Chapter 3).

Educational effectiveness goes beyond the classroom, ensuring that graduates are successful, as measured by job placement rates, professional licensure rates, alumni satisfaction, and other metrics. The University assesses professional programs, student support service utilization and outcomes, and new student initiatives for their impact on current students' success through evaluation instruments [E5-09; E4-80], program tracking [E5-10; E5-11], and engagement data [E4-84; E5-12] and post-graduation alumni surveys and placement data [E4-88; E4-90; E4-91; E5-13].

Academic Assessments: Overview of Processes

The academic assessment process is outlined in IU's IEP [E1-04, section VI], which Immaculata reviews and updates at least annually. The culture of assessment

represented in the IEP encompasses several resources, like committees and academic support offices, assessment activities such as Student Learning Outcomes (SLO) assessment and 5-Year Program Review, course evaluations, as well as regular student surveys. The University uses results to evaluate and improve programming and student performance, as this chapter demonstrates.

Academic assessment structures [E1-04, p. 15] support IU faculty engaging in ongoing assessment. The Office of Academic Assessment (OAA) coordinates with the Academic Affairs Office to help faculty and departments prepare for SLO assessment and 5-Year Program Reviews; to ensure assessment best practices and standards across programs/degrees, and to coordinate dissemination of academic assessment activities. Faculty engagement is paramount in overseeing academic assessment activities; two faculty committees exist specifically to serve these purposes:

- » The Academic Assessment Committee [E1-01, 1.7.2.2.4], which reports to the Academic Affairs Dean, reviews annual SLO assessment reports and 5-Year Program Review drafts [E5-14; E5-15] in support of the institutional academic assessment process and helps generate ideas for faculty development programming in support of assessment efforts.
- » The Undergraduate Core Assessment Committee (UCAC) [E1-01, 1.7.2.2.3], which reports to the Undergraduate Curriculum & Policy Committee, evaluates all courses submitted for inclusion in the Core curriculum as well as develops, deploys, and evaluates data from Core learning assessments.

In 2021, the OAA launched an Academic Assessment Hub on Moodle [E3-105]. This resource, available to all full-time faculty and academic administrators, functions as a central repository for 5-Year Review and SLO Assessment documents and reports, as well as guidelines for current academic assessment procedures/policies. Plans for the site include expanding its role as an assessment resource and sharing additional assessment content, such as instructional modality assessment data [E5-16], as that project develops.

5-YEAR PROGRAM REVIEWS

The 5-Year Program Review is a self-study conducted by the department/division and shared institutionally at the faculty meeting and on the Academic Assessment Hub [E3-105]. Every major program on campus (undergraduate and graduate) must complete the program review according to the published cycle [E1-39, pp. 15-16].

The self-study encourages departments to celebrate achievements, highlight distinctive qualities, and identify opportunities for improvement in program pedagogy and curriculum. Specifically, the 5-year report template guides departments/divisions in examining programs through a variety of lenses: mission and vision; program and student analysis; alumni data, including graduate school and professional placements; program positioning and market analysis; curriculum relevance (particularly internship, practica, and/or culminating learning experiences, such as capstone courses or projects); programmatic student learning assessment; material and human resource assessment; and goal setting/planning based on the report findings. Reports serving as samples from the Education Division and the programs in theology, exercise science, business, emergency planning/management, and psychology/counseling illustrate the extensive analysis departments conduct [E1-35—E1-38; E5-17; E5-18; E3-110—E3-113; E5-19].

The program review process begins in June; the OAA invites departments undergoing program review to launch meetings [E5-20] where participants discuss the process, the tools, and the resources available to support faculty in their report development. The academic department shares a mid-year draft with the Academic Assessment Committee, which reviews and provides high-level feedback to the academic departments before the final reports are due [E5-14]. In April, department/division chairs and/or program directors review their reports, which are distributed in advance to the appropriate policy committees for their review and approval. Full faculty receive brief presentations highlighting each 5-Year Report's findings at the April faculty meeting as an effort to extend sharing of assessment results across the campus [E5-21]. OAA archives all 5-Year Review Reports and presentations on the Academic Assessment Moodle Hub [E3-105]. The departments are responsible for implementing the results from 5-Year Program Reviews, which may be implemented through the SLO assessment process or the Annual Plan, depending on the nature of the actions identified.

DEPARTMENTAL STUDENT LEARNING OUTCOMES (SLO) ASSESSMENT

Faculty within the academic departments/divisions use a planning template [E3-104] and follow the annual timeline detailed in the IEP [E1-04, Section VI] to document progress in meeting their stated learning outcomes. Each department/program/division assesses one to three SLOs each year and completes a full cycle of assessment (addressing all program SLOs) within a 5-year period. Departments/divisions complete an assessment matrix for each major; the matrix includes an overview of where the curriculum introduces,

reinforces, and assesses each program outcome across the program's required coursework and is used as a basis for the annual SLO assessment process. Once departments/divisions complete the annual review, they share the results with the OAA for review. Departments/divisions use data in various ways to support continuous improvement, such as updating current course offerings and assignments or identifying more effective methods for achieving learning outcomes.

The exercise science program offers one example of how programs use assessment to make positive change. When evaluating their program's SLO 3, "Critically analyze concepts of the basic sciences, nutrition, and psychology related to human movement," in EXS 403 Research Methods, program faculty employed an assignment and rubric designed to assess student ability to critically appraise research studies of both clinical trials and observational design. During the spring 2022 assessment of the SLO, faculty assessed these elements as part of one assignment. The spring 2022 findings indicated a need to change the approach, and, in the most recent evaluation, the department modified the assignment into two assignments and used a new grading rubric to evaluate the skill. Eight out of nine students were able to meet or achieve a score of 90% or higher on the rubrics, which "demonstrated [a] better understanding than in previous years" [E5-22].

In another example, biology faculty evaluated their program's SLO 3, "Exhibit proper and safe procedures for the set-up of laboratory equipment and preparation of specimens, in both microbiology and their senior seminar I courses" in spring 2022. The microbiology class and lab set-ups were evaluated twice (once early, once later) in the term. The faculty saw marked improvement in student protocols. In the seminar course, while students generally had strong skills, the department observed some lax practice in set-up elements. As a result of the assessment, faculty now spend additional time addressing the importance of lab set-ups with students [E5-23; E5-24].

UNDERGRADUATE LIBERAL ARTS CORE LEARNING OUTCOMES ASSESSMENT

The Undergraduate Core Assessment Committee (UCAC) was established in 2017 and initially charged with a two-fold purpose: (1) to redesign Immaculata's undergraduate liberal arts Core curriculum, and (2) to replace the multi-core model that had been difficult to assess. Using the American Association of Colleges & Universities (AAC&U) VALUE rubrics as a guide [E5-25], the committee began by developing and proposing a new set of core outcomes that would align with the University mission and values, serving all

undergraduate students regardless of program/learning modality. Full-time faculty approved the outcomes in fall 2017 [E5-26]. The undergraduate core curriculum, familiarly known as “the Core,” was approved by full-time faculty in fall 2018 and was implemented in fall 2019 [E1-16, pp 49-51]. Chapter 3 furnishes an overview of the Core categories and seven corresponding learning outcomes. The faculty designed the Core to provide students with foundational knowledge regarding vision, inquiry, and community.

UCAC approves courses for inclusion in the Core using an evaluation form adapted from the VALUE rubrics, and those same rubrics inform and guide the assessment instrument designs [E5-27] used to

evaluate those VALUE-based skills in the Core. Departments submit courses to the UCAC, which makes the final determination of each course’s alignment with the Core program’s outcomes.

UCAC manages direct assessment of the Core, having conducted its first evaluation cycle in fall 2020. After the pilot year, UCAC evaluated a minimum of two outcomes per year (Figure 5.1). This assessment cycle ensures that all seven learning outcomes will be evaluated by the end of 2024-2025. UCAC may re-deploy assessments during the cycle as needed to obtain adequate data/completion rates.

Figure 5.1

Undergraduate Core Assessment Committee: 2020-2025 SLO Assessment Cycle

2020-2025 Learning Outcome Assessment Cycles	2020-21*	2021-22	2022-23	2023-24	2024-25
1. Pursue truth through critical, independent, and creative thinking.			X Nat Phys	X Wis	
2. Obtain, evaluate, and utilize the data which enables individuals to pursue knowledge and understanding.		X Quant	[Re-deploy Quant]		
3. Communicate proficiently in written, oral, digital, and visual formats.		X Comp	[Re-deploy Comp]	X Creativ	
4. Collaborate effectively in groups in an inclusive and respectful manner.	X FYS				
5. Understand the nature and requirements of moral judgment and ethical reasoning.					X Ethics
6. Recognize how both the previous development of civilizations and contemporary forces have created a complex, diverse, and interdependent world in which they must live as engaged citizens.			X Hist and Global		
7. Recognize the transcendent dimensions of the human person as foundational to a moral vision of society.					X Faith

***2020-2021 was the pilot year (starting point to the Core Assessment cycle)**

Assessments are re-deployed if the committee deems the completion rate to be too low

Comp: Composition; Creativ: Human Creativity; FYS: First-Year Seminar; Hist and Global: Historical Consciousness and Global Society; Nat Phys: Natural & Physical World; Quant: Quantitative Reasoning; Wis: Pursuit of Wisdom

The UCAC is actively developing the assessment instruments for courses in all sub-categories of the curriculum, allowing for a consistent evaluation of SLO achievement. Teams of two to three faculty members collaborate on each learning outcome and develop case studies or pre/post-assessments. As the committee is still refining the assessment tools, the group meets monthly to continue the development process [E3-99; E5-28; E5-29].

The committee’s faculty co-chairs reach out via email to any instructors with courses targeted for assessment prior to the start of the semester, alerting them that assessment will occur [E5-30; E5-31]. Students receive notification through Moodle about the impending assessment. UCAC asks faculty to encourage students to complete the assessment activity, available to them in the Moodle course page.

Currently, the UCAC employs two instrument formats for the Core's assessment [E5-32]. The more typical format is a single case study/reading activity with 4-6 accompanying questions. This kind of instrument is deployed in the final 3-4 weeks of the semester. Aggregate responses are evaluated for the percentage of correct answers. The second assessment format uses both a pre- and post-course assessment quiz. Currently used to assess creativity and intercultural knowledge, the pre-assessment takes place in the first 1-2 weeks of the semester, and the post-assessment in the final three weeks of the semester. UCAC compares pre- and post-test responses to evaluate growth in the skillset over the term. The committee also evaluates aggregate responses to evidence change over time. As of fall 2023, UCAC has created and implemented six assessment tools since adopting the core assessment process in fall 2020 (Figure 5.1) [E5-27].

The UCAC reviews responses at the end of the semester to confirm that students meet the benchmarks: 70% completion rate, 70% of all assessments completed earning 70% correct (when applicable) or demonstrating 70% increase in perceived skill competence (when applicable). Details regarding the assessment process and results are available on the Core Program Moodle Hub [E5-33].

Data from fall 2022 showed achievement scores below the benchmark (average total grade of 61.55%) [E5-29; E5-34]. The data also showed students spending only minimal time completing the assessment instrument; for example, fall 2022 shows students spending, on average, only 3.54 minutes while completing the assessment. In fall 2023, the committee co-chairs presented to full-time faculty, underscoring the importance of these assessments and recommending that faculty devote about 15 minutes of class time for students to complete the assessment [E2-48]. Additionally, to stress the importance of the assessment, UCAC added language to the Core syllabus template, requesting students give the assessment exercise careful attention [E1-34]. The committee is evaluating fall 2023 assessment results to see if the time students spent completing the assessment increased and if scores improved. The committee has also, with the assistance of OAA, begun comparing student performance on Core assessments across online and classroom modalities, with initial results suggesting no significant statistical differences in student performance between the two instructional modes [E5-35].

As an intervention to the initial data points, the committee modified communications to faculty and students regarding Core assessments [E5-34]. To fully evaluate academic achievement levels for the core curriculum itself as well as the efficiency and

effectiveness of the assessment tools, UCAC recognizes it will be necessary to complete the assessment cycle first (Figure 5.1). Any significant adjustments to the Core's design, content, and/or outcomes will occur only after the committee can collect and assess all Core elements and obtain the approval of the Undergraduate Curriculum and Policy Committee and full faculty [E2-10, 5.4.2.2].

Secondary data suggest that IU's graduates observe and appreciate the impact of the new core curriculum. The 2022 graduates' survey responses overwhelmingly (90%) indicated the Core "enriched their education." The Office of Institutional Research and Effectiveness notes, specifically, that these core curriculum ratings in the 2022 survey "are the highest collected for this question from 2015 to the present" [E4-104, p. 3]. High core curriculum ratings continued in 2023, with 86.7% of students indicating the Core "enriched their education" [E1-60 Q38].

FIRST-YEAR SEMINAR (FYS)

FYS courses, required for incoming students with less than 30 credits, are designed around an enduring question enhanced by each teacher's area of expertise/passion (i.e., psychology, communication, literature, health sciences) as a lens through which to explore that question, providing innovative selections for freshmen who will learn more about themselves, others, IU, and the importance of wellness in all aspects of life [E5-36; E4-23, p. 20]. FYS (2019) replaced the previous one-credit first-year experience course; this redesign resulted in a richer seminar class that allows students to connect more effectively with each other and with their professors.

At the end of the semester, all FYS students participate in a showcase, where groups present their projects related to their course's enduring questions. This showcase, which is open to the entire Immaculata community, demonstrates the Undergraduate Core Learning Outcome 4 regarding teamwork and links to academics (Core) and beyond (IU's mission). At the end of the semester, each student, using an online evaluation form [E5-37], assesses their team members in the following areas: contribution to team meetings inside and outside the classroom, fostering a constructive team climate, and response to conflict [E5-38].

First-time freshmen enrolled in FYS complete the College Student Inventory (CSI), a tool that facilitates early alerts for at-risk students and their individual motivation. Faculty employ the CSI results to guide and mentor students with the aim of encouraging student retention and success [E5-09; E4-80]. The Center for Undergraduate Advising also shares key data points

with other academic support offices around campus to improve overall educational effectiveness.

STUDENT COURSE EVALUATIONS

In addition to SLO assessment results and informal assessments throughout the semester, faculty regularly receive and review student feedback via course evaluations; student comments and ratings assist faculty with analyzing and improving their teaching practices [E2-78]. At the end of each semester, faculty and their department chairs receive the summarized course feedback, which becomes part of the faculty profile and are included in faculty professional development reviews (Chapter 3). Where evaluations suggest areas for improvement, program directors/chairs and faculty work together to ensure improvement in teaching effectiveness. As an example, after reviewing several course evaluations within the graduate nutrition program coupled with exit survey results, the program faculty chose to enhance the student learning experience across all courses with a mid-point check-in activity. The subsequent exit survey results identified a significant improvement from 2022 to 2023 [E1-61, p. 4].

Academic Assessment in Action: Case Studies

Immaculata's academic programs offer myriad examples demonstrating the effectiveness of assessment procedures and use of information for quality improvement. Program change tracking over the last three years demonstrates the scope and variety of such changes and how and where program faculty assess the impact of those revisions [E5-39]. Two programs illustrate in greater detail how assessment leads to improvement: the B.S. in Emergency Planning and Management, an undergraduate major without external accreditation, and the PsyD program, an accredited graduate program.

UNDERGRADUATE EMERGENCY PLANNING AND MANAGEMENT (EPM) PROGRAM

Initially developed as a degree-completion program in 2012, the undergraduate program in Emergency Planning and Management has expanded to include traditional students (as of fall 2020). While a small program, the major has been recognized among the best EPM programs in national publications [E5-19, p. 11]. A professional advisory board ensures that the EPM program is maintaining appropriate standards [E5-19, p. 28]. The program director meets at least once a year with a group of field experts in EPM to consult on program-specific issues.

In 2022-23 EPM 5-Year Review Report, and after consultation with the board, the program director identified gaps in the curriculum, noting that, while the courses provided excellent foundations in the field, there was a gap in addressing issues of mitigation, preparedness, response, and recovery as key elements of the emergency planning skills. As a result, the program submitted and had changes approved to bridge that gap and refine the curriculum to better address these elements [E5-40; E5-41].

PSYD PROGRAM - APA ACCREDITED

The PsyD in Clinical Psychology measures students' success by their attainment of the Minimum Level of Achievement (MLA) in all areas of profession-wide competencies and discipline-specific knowledge, as established by the American Psychological Association (APA). Students work toward MLA through coursework, practicum, and the PsyD Comprehensive Examination. The program generates an annual PsyD Student Progress Review [E5-10] for each student. The report lists required courses, the competencies associated with each course, and the final grade received. Coursework requires a minimum of a B or a Pass for Pass/Fail. Practicum supervisors evaluate students once per semester [E5-11], and students must achieve at least a 3 on a 5-point scale. A rating of 7 on a 10-point scale is the MLA for each area of the PsyD Comprehensive Examination. The program maintains a spreadsheet of the MLA data, which shows the number of students who achieved MLA for each course [E5-42].

Annually, students complete a self-evaluation and rate their academic growth for each of the competencies. The self-evaluation also provides space for students to make comments/suggestions regarding the program, which the PsyD Program Director reviews. The data are compiled in a spreadsheet, showing both individual responses and aggregated data by competency. Then, as part of the program's exit interview process, graduating students complete a final self-evaluation of competencies as the culmination of their time in the PsyD program. They also rate and provide feedback regarding their experiences in the program, such as skill development, dissertation process, and the most/least positive aspects of the program. The program utilizes the feedback to make improvements [E5-43]. For example, graduating students rated themselves (on average, on a 5-point scale) 3.08 in research competencies. In 2022, the program revised the research section of the PsyD Comprehensive Examination to better assess what the students were learning in this area by providing clearer application of statistical knowledge and research practices.

Campus-wide Assessments

DEPARTMENTAL ANNUAL PLANNING

Immaculata's annual planning process facilitates assessment [E1-04] as all institutional offices and academic departments participate in the process. Beginning in October and using the IRE-designed annual plan template [E5-44], each area creates department-level strategic tactics, aligned with institutional strategic goals and institutional actions; identifies responsible parties; evaluates the upcoming fiscal year needs and/or resources required, and anticipated deadlines (Chapter 6). Departments share the status of their annual plans with their area vice president midway through the year. At the end of the annual cycle, the department/division or office reviews the plan [E5-44] and reports the status of strategic tactics to the area Vice President. The IRE office reports institutional feedback on achievement of the strategic planning goals [E5-45; E1-51; E1-52; E5-46].

End-of-year assessment reports for each annual plan are submitted in July/August, allowing time for departments to evaluate progress towards the stated strategic goals. The IRE office then collates and evaluates institutional progress in achieving the Strategic Plan [E5-46; E5-47]. At the start of fall term during the University meeting for all employees, the President and vice presidents share highlights from their areas based on the previous year's planning results [E2-46; E2-35].

OFFICE OF INSTITUTIONAL RESEARCH AND EFFECTIVENESS (IRE)

The IRE prepares an annual suite of tabular and graphical resources to provide longitudinal quantitative data to assist Academic Affairs and other institutional offices in the assessment of program enrollment, trends in student body composition, and overall effectiveness. Such resources include the Electronic Fact Book [E5-48], college profiles [E5-49—E5-51], student demographics [E2-58], graduation rate analysis [E5-52], and retention tables [E4-60; E4-65; E4-63; E4-115]. In addition, the IRE partners with various departments to complete annual and other regularly occurring surveys, which include, as examples: Graduating Student Exit Surveys, Residence Life and Housing Survey, Five-Year Alumni Surveys for academic programs in review, Office of Technology Services - Student and Faculty Survey, and the First Destination Survey. These instruments are administered in a consistent cycle and data are shared with relevant departments, administration, and staff [E4-90; E1-04, Section IX and Table 4]. Immaculata uses student and alumni survey data to improve programming to ensure that the University is fulfilling its

mission and meeting the strategic goals and that students feel supported and equipped for professional and personal success. Departments, programs, and campus services have made positive changes in response to the information gathered; a few examples are noted below. The following sampling of surveys identifies the purpose and frequency of each survey, an example of findings, and how those findings lead to change.

Graduating Students - Exit Surveys

Every May, the IRE administers an exit survey to graduating students and then compiles summary reports, which present up to five years of comparable data regarding student demographics, outcomes, and preferences for graduating students. Areas assessed in the survey include overall satisfaction with academics, faculty, campus life, personal and professional growth, preparedness for graduate school, employment, mission, and overall college experience [E1-60—E1-62]. One of the key findings in the CUS survey of 2023 indicated that “students rated 13 service areas in questions 19 and 20, including the Math Center, Writing Center, Financial Aid, Campus Ministry, Registrar's Office, Career Planning and Placement Office, Campus Store and others. Service area scores ranged from 4.06 to 4.56 of 5, indicating high levels of student satisfaction across the institution. ‘Campus Ministry’ (4.56 of 5) received the highest aggregate rating for the second consecutive year” (Excerpt, [E1-60]). Religious, service, and programming activities as well as facilities improvements in Campus Ministry have been augmented by the Ambassador's Grant as one possible rationale for increased satisfaction. Across populations, students rated the overall impact of the Immaculata learning experience highly. Spring 2023 graduating CUS students rated all aspects of overall student development as ≥4.07 of 5 across skill sets [E1-60, Q11]. Graduate students rated their overall graduate experience at Immaculata University as 4.36 out of 5 [E1-61, Q8].

First Destination Survey and Employment Data

IRE, with support from the Office of Career and Professional Development (OCPD), collects information from traditional undergraduate alumni through its First Destination Survey [E5-53], allowing Immaculata to maintain alumni connections, offer support while collecting data about post-graduation employment and continuing education, and identify areas where the University can make improvements to support graduating students. The survey also records alumni perceptions of the impact their field experiences and career services have had on their job searches. IRE supplements survey data with additional sources, such as the National Student Clearinghouse, enrollment data, verifiable LinkedIn employment data, published

staff directories, phone interviews/email correspondence between graduates and career office staff, resumes, and employment information from faculty and staff, to ensure as full a picture as possible of this group of IU alumni [E4-88; E4-90; E4-91].

The University uses employer data from the First Destination Survey to report alumni success stories, update the website, and provide informational brochures to market OCPD services and overall student success at IU. Data also supports employer outreach for future student internship and job opportunities. The IRE office has compiled data from 2019 through 2023, and placement outcomes are broken down by major.

Data also show that outcomes improved for traditional undergraduate alumni, from 49% in full-time, in-field employment in 2021 to 57% in 2022 [E4-88; E4-90]. OCPD has created strategies to connect with students preparing for internships and employment. In 2019 the first Social Science Career and Internship Fair was held, with 15 employers and 50 students in attendance; in 2023, the event grew to 38 employers with 131 students in attendance [E5-54]. An additional method for connecting with students early in their academic journey was the establishment in 2021 of a resume assignment as part of the FYS class [E5-36, p. 4].

Student Food Access on Campus Survey

Best practices indicate that when students' basic needs are not met, their educational performance is impacted negatively. One known and addressable issue is food insecurity. In fall 2018, the VP for Mission & Ministry office identified food insecurity as a growing issue and worked collaboratively with a nutrition faculty member and IRE to administer a food access survey to all students [E5-55], assessing the prevalence of food insecurity among students at Immaculata University. The overall response rate was 19.0%, and nearly 30% of students reported some food insecurity, with higher rates in several minority groups. Immaculata immediately responded, instituting the IU Cares Food Cupboard the following semester (Chapter 1).

Since then, the IHM Student Center opened with more food options, and the IU Cares Food Cupboard expanded from limited hours to an open-door policy, providing universal access to nutrition for those who need it. Funded through donations from employees, students, and outside constituents, the food cupboard demonstrates the lived mission of Immaculata in developing the whole person and serves as an example of how campus-wide assessment results can lead to concrete, practical improvements.

Student, Faculty, and Staff Technology Survey

In spring 2021, the Office of Technology Services (OTS), with the assistance of IRE, administered user

surveys to students [E5-56], faculty [E5-57], and staff [E5-58] to measure satisfaction with the technology resources, equipment availability, Wi-Fi accessibility and technical services support. For faculty and staff, the survey also measured satisfaction with technology resources, enterprise system performance, and technical services support (Chapter 6).

While the Immaculata community was generally satisfied with resources across the surveys, one area for improvement was the help desk services, particularly the expediency and effectiveness of responses. In spring 2022, OTS launched a new ticketing system, FreshService [E5-59], which gave users a more IU-specific service catalog and user guide [E5-60]. The FreshService tool also ensured that, when appropriate, requests went directly to the in-house service personnel. Subsequent metrics from FreshService indicate that technical support staff respond rapidly and close tickets efficiently [E5-61].

OFFICE OF STUDENT DEVELOPMENT AND ENGAGEMENT (SD&E)

Student Development & Engagement areas are also attentive to assessment as part of evaluating traditional undergraduate students' overall educational experience and in alignment with the mission's focus on the formation of the whole person. SD&E completes the following surveys annually to support initiatives in the holistic student experience, which includes overall academic success: Residence Life Survey, New Student Orientation Parent Survey, New Student Orientation Student Survey, and Student-Athlete Survey. Data is shared with the Executive Administration and SD&E staff.

Residence Life Survey

SD&E conducts the Residence Life & Housing Survey annually in February for all resident students and covers many topics related to student life on campus [E4-100; E2-65]. Survey data are used to make continued improvements to the student experience. For instance, the recent survey identifies issues with common spaces, resident resources, and campus programming. As a result, Immaculata has made such changes as redesigned student lounges, improved laundry room efficiency, and more weekend programming.

New Student Orientation Surveys

With the assistance of the IRE, SD&E surveys both the parents of all incoming freshman students and the students themselves who attend New Student Orientation (NSO) to gauge overall satisfaction with orientation elements. Parent Surveys from both the previous (2021) and revised (2023) NSO formats [E5-62; E5-63; E4-47] indicated high overall satisfaction

with NSO. SD&E has used suggestions for improvement, such as considering presentation relevance, to enhance future NSO planning.

With parallel student surveys, SD&E assessed topics such as: overall satisfaction with NSO, evaluation of and satisfaction with presentations, evaluation of and satisfaction with sessions, feelings of welcome, experience with check-in process, communication preferences, satisfaction with activities, campus experience, satisfaction with academic advising, social media presence, and suggestions for improvement [E5-64; E5-65; E4-46]. NSO survey presentation feedback, coupled with best practices for incoming freshman retention, led to a substantial revision of the timing and expansion of event length of NSO between 2022 and 2023 [E4-40]. These revisions led to greater cross-campus engagement in the experience. The NSO team is actively employing the latest event results [E4-46, blue text] to further strengthen the experience.

Student-Athlete Survey (Athletics)

With the assistance of IRE, SD&E conducts four student-athlete surveys per year, covering fall, winter, and spring sports, as well as esports. These surveys gauge athletes' satisfaction with their coaches' and the athletic department's performance in the following areas: character and ethical conduct, relationship with players, coaches' knowledge of sport and ability to communicate knowledge, organization and administration of programs, stability and performance under pressure, strength and conditioning, athletic training, and academic services and career and professional development. In response to the 2021 survey [E4-112—E4-118], addressing survey feedback, SD&E revised the IHM Student Center's exercise hours to align more with student-athletes' needs.

Educational Effectiveness: Evaluating the Assessment

Evaluating the processes used to determine student achievement of educational goals requires an ongoing and multifaceted engagement with not only the data received through those processes but the tools and supports in place to support effective educational assessment.

The Office of Academic Assessment (OAA) and Academic Affairs Dean complete an annual informal evaluation of OAA processes, forms, and general operation as well as periodic formal evaluation using survey feedback [E5-66; E5-14]. The OAA reviews and revises templates, forms, and communications regarding academic assessment in preparation for each academic year's cycle. The OAA had been experiencing challenges: inconsistent response from departments submitting final SLO assessments to the

office, concerns about communication from the office on assessment requirements, and points of confusion and time issues for departments completing the 5-Year Review. The OAA made several adjustments that include: the institution of the Academic Assessment Hub [E5-67; E5-68]; creation of a timeline for key communication outreach to departments on assessment projects [E5-69; E5-20]; sharing of 5-Year Program Review results with the entire full-time faculty by way of recorded presentations [E5-70]; refining the 5-Year Review templates [E1-35—E1-38] to include a planning table that can further support linkage between the review and SLO Assessment/Annual Plans [E1-35; E1-36; E1-37; E1-38; E5-21]; and new means of providing feedback to departments to highlight their 5-Year Program Review results [E5-71; E5-72]. Initial feedback based on changes made in 2022-23 document improvement in SLO final assessment submission [E5-73] and suggest generally positive attitudes after revisions to the 5-Year Review process [E5-74].

IRE takes a robust and consistent approach to institutional data reporting and survey data collection and evaluation to support all units across the University. The office works in conjunction with the areas of the institution deploying the survey; consults on the instrument design; and provides both specific instrument responses and, when appropriate, longitudinal data comparing progress in key surveyed areas over time [E1-60—E1-62; E5-56—E5-58; E1-64].

A new campus-wide assessment initiative began in spring of 2023; the President shared with the Immaculata community a new initiative, titled "Strategic Academic Program Assessment," which focuses on examining IU's current academic programming, specifically regarding mission, relevance, and financial impact [E5-75, p. 19]. An external consultant conducted the assessment, and the VPAA/Provost shared key findings from this initiative with faculty in fall 2023. The Strategic Academic Program Assessment indicated that the robust course schedule each semester is not supportable given the enrollment numbers. During the 2023-2024 academic year, the college deans and VPAA/Provost are working collaboratively with department chairs and program directors to support the course sequence reviews with the goal of determining how frequently major classes are scheduled, especially those courses only taken by students in the major. Immaculata will be evaluating academic programs carefully: examining undersubscribed programs, looking for areas of growth, and determining potential opportunities for Immaculata. As the University works to ensure ongoing institutional financial sustainability, it will be crucial to approach course scheduling more strategically. Figure 5.2 outlines the Strategic Academic Program Assessment department/division timeline for

2023-2024. The VPAA/Provost shared the timeline with all full-time faculty [E5-76]. The approach outlined below will help guide the University in continuing to provide students with market-driven, relevant programs in line with the mission.

As of fall 2023, the deans and VPAA/Provost have begun meeting with department chairs/program directors for this strategic initiative. The meetings have centered on the enrollment within each program within the department over the past three years, observations and challenges within the department's academic programs, and development of strategies to move the department forward in a more effective and efficient

manner. After the meetings, the observations, challenges, strategies, and timeline are captured in the department academic assessment report. An example of a change prompted by the academic program assessment included the plan to develop a Bachelor of Arts to complement the current Bachelor of Science program, creating two pathways in cybersecurity, with the Bachelor of Science focused on higher-level technical skills. The Cybersecurity program assessment also identified the need to re-launch a cybersecurity advisory board; the field changes so rapidly that the use of industry experts as advisors will ensure that the curriculum is relevant and responsive to current industry standards and needs [E5-32].

Figure 5.2

Strategic Academic Assessment Department/Division Timeline 2023-2024

Timeline	Tactic
September – October 2023	The deans will review the course schedule for spring 2024 and work with identified department chairs/programs directors to reduce the number of courses offered within the undergraduate Core curriculum.
October 2023 – March 2024	The deans/VPAA/Provost will meet with the department chairs/programs directors to discuss course sequencing and examining undersubscribed programs. These meetings will involve two departments per month (October, November, December/January, February, March), as outlined below: • October: Arts, Languages & Letters and Natural Sciences • November: Applied Technology & Mathematics and Psychology & Counseling • December/January: Business, Fashion & Leadership; Theology & Philosophy; Health, Nutrition & Exercise Science • February: Civic Engagement and Nursing • March: Education and Music
December 2023	The deans will evaluate spring 2024 course enrollments and work with department chairs/program directors to consolidate/cancel courses as needed.
December 2023 – June 2024	The department chair/program director/dean/VPAA will work collaboratively to develop an action report for undersubscribed programs. Reports due 60 days after the initial meeting between October – March.
January 2024	Academic Portfolio Future Growth Opportunities – Faculty Workshop
January 2024 – August 2024	Track progress of the action reports.
January – February 2024	The deans and department chairs/program directors develop the fall 2024 course schedule.
May 31, 2024	Updated course sequence sheets for majors to deans

Summary

Assessment of educational effectiveness is a multi-faceted, high-quality, formal, 360-degree process. IU uses several assessment methods, including annual institutional and departmental planning, 5-year academic department/program assessments, undergraduate core learning assessments, and accreditation standards at the institutional and programmatic levels. Externally accredited programs conduct additional alternative assessments that are in line with program-specific requirements. Governance policies and procedures ensure consistency in assessment across programs, degrees, and the institution. Assessment best practices, standards, and results are disseminated across the institution and, as appropriate, are shared with the public.

KEY FINDINGS

- » Assessment support is offered institutionally, and dissemination of results allows for collaboration and engagement. Academic departments are encouraged to use assessment data to revise and improve pedagogical practices and to seek out new initiatives to provide students with innovative learning experiences.
- » The University has established clearly stated student learning outcomes at the program level, and they are interrelated in their shared responsiveness to the mission.
- » Educational effectiveness goes beyond the classroom, reflecting the IU mission by ensuring that graduates are successful individuals who can lead and serve. The University measures educational effectiveness by such metrics as job placement rates, professional licensure rates, and alumni satisfaction. Immaculata assesses professional programs, student support service utilization and outcomes, and new student initiatives for functionality and for impact on student success both while students are enrolled at IU and post-graduation.
- » Attention to students and their needs, expressed formally through assessments and informally through community interactions, spurs innovative programs such as the revised Core and the re-imagined First-Year Seminar. This organic change fosters yet more change that directly benefits members of the IU community and the larger community.

CURRENT INITIATIVES

- » IU's Core: With the establishment of the Undergraduate Core Assessment Committee, the University employs innovative methods for evaluating how well undergraduate students

engage with and learn from the core curriculum. This vibrant faculty-led committee demonstrates strong commitment to the success of the Core assessment and the support of students' "formation [as whole persons]." As a signature element of the Core, the First-Year Seminar is an engaging and evolving effort, responsive to student and faculty feedback.

- » Pedagogical practice and development: The faculty-led CASTLE provides ways for faculty to collaborate and learn from each other with assessment and research presentations. Supported by CASTLE, the Academy for Metacognition offers an opportunity for faculty to engage in collaborative discussions of pedagogical practices.
- » The Academic Assessment Hub: Launched in fall 2021, the hub serves as a centralized repository for assessment documents and supports both Academic Assessment Committee processes and 5-year review processes [E3-105]. The OAA envisions expanding the usefulness of the site so that it becomes a primary resource for academic assessment activities. Such efforts will include curating institutionally employed rubrics in an expanded assessment toolkit and producing/posting a best practices SLO Assessment document based on program submissions and Academic Assessment Committee insights [E5-67; E5-68].
- » A Pilot Assessment Study: The Student Performance by Modalities Audit examines student achievement in OSM courses across classroom and online instructional modes, including undergraduate courses (BUS 315, 338; COM 250; HIST 116; PSY 205; THE 408) and graduate courses (EDL 625, GEN 502, 503). Courses in this audit support several programs. Data are being used to evaluate the effectiveness of these courses in each mode of instruction [E5-16].
- » The First@IU program: Targeting support to first-generation college students, the program began in fall 2022 and aims to engage these students and create a supportive educational environment for them. Faculty and staff act as mentors and provide special outreach programming for these students. A CASTLE-sponsored presentation created awareness of the new initiative [E5-08]. First@IU is intended to both improve first-generation students' sense of belonging and positively impact retention rates for this population.
- » SLOs in Moodle: After launching the latest version of Moodle, OL and C&I will work with at least one OSM program per year to align SLOs

within the LMS, providing chairs and program directors an easier way to collect and evaluate student achievement of learning outcomes across course sections, classes, and semesters.

FUTURE DIRECTIONS

Responding to the mission, Institutional Priorities (IP), Strategic Plan (SP), and drive for continuous improvement, the evaluation of Immaculata's adherence to Standard V's criteria led to the following improvements and innovations:

- » While the University has robust practice for sharing the results of 5-Year Program Reviews with academic departments and administrators [E5-21; E3-105], report data should be shared beyond the academic unit. Findings may assist other areas, such as marketing, admissions, and SD&E, in supporting recruitment, retention, and holistic education of IU students with even greater efficiency (IP 2 and 3; SP IV.2).
- » Implementing data from the Strategic Academic Program Assessment (2023), Immaculata will provide mission-driven and market-relevant academic programs (IP 2 and 3; SP II.3 and IV.2).



Chapter 6: Standard VI – Planning, Resources, and Institutional Improvement

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

Standard VI: Criteria Mapping

CRITERIA	HEADING
1	<i>Institutional Effectiveness Model</i>
2	<i>Institutional Effectiveness Model; Aligning the University Budget to the Strategic Plan and Mission</i>
3	<i>Aligning the University Budget to the Strategic Plan and Mission</i>
4	<i>Ensuring Long-term Sustainability through Resource Planning and Financial Management; Financial Management and Control; Utilizing Resources to Achieve Goals</i>
5	<i>Institutional Effectiveness Model; Financial Management and Assessment</i>
6	<i>Ensuring Long-term Sustainability through Resource Planning and Financial Management</i>
7	<i>Independent Audit and Financial Viability</i>
8	<i>Utilizing Resources to Achieve Goals; Financial Management and Controls</i>
9	<i>Assessment</i>
ROA 5	<i>Independent Audit and Financial Viability</i>
ROA 10	<i>Institutional Effectiveness Model; Strategic Plan; Institutional Effectiveness Plan; Annual Planning Process & Assessment</i>
ROA 11	<i>Financial Management and Controls; Financial Management and Assessment; Independent Audit and Financial Viability</i>

Overview

Immaculata University's success and viability are a result of prudent planning, careful management of resources, and a deliberate and systematic process for continuous improvement.

Immaculata University's progress toward long-term sustainability is consistent with its mission, goals, and Institutional Priorities. Constituents understand that resources are not unlimited, and they can help achieve long-term viability by carefully managing resources through a continuous process of evaluation that reasonably minimizes risk and maximizes the potential for beneficial outcomes.

Immaculata University meets the requirements of Standard VI, its nine criteria, and Requirements of Affiliation 5, 10, 11. Immaculata's fulfillment of these elements is evidenced throughout this chapter.

Institutional Effectiveness Model

The institutional effectiveness model (Figure 6.1) illustrates the flow of University planning, budgeting, use of resources, and assessment. The implementation of each element is guided by the University's mission, core values, and Strategic Plan. The Institutional Effectiveness Plan (IEP) outlines the decision-making process, details the process for how each element of the model functions, and assigns responsibility and accountability.

Figure 6.1
Immaculata's Institutional Effectiveness Model



INSTITUTIONAL EFFECTIVENESS PLAN

The IEP coordinates many cross-campus assessment activities, creating an institutional understanding of how integral each unit is in accomplishing the mission and educational aims of the University. This plan communicates to all campus constituents and stakeholders the importance of systematic assessment for the purpose of ongoing improvement, demonstrating how various assessment efforts feed into University operations, budget considerations, and the Strategic Plan. The institution stresses that the work of assessment involves the entire community. The IEP encompasses strategic planning, institutional assessment/annual planning, academic assessment, accreditation, and the budget process. Immaculata evaluates the IEP annually and includes the most updated processes and accreditation status timelines.

Assessment guides the annual planning process (Figure 6.1) and ensures the University's IEP reflects changes based on research and trends in higher education that impact the Strategic Plan. The IEP timeline presents an overview of the steps taken throughout the year to examine the strategic planning efforts as reflected through the Annual Plans of units,

the budgeting process, and the various academic assessments [E1-04, pp. 3-5].

STRATEGIC PLAN

Immaculata generates its Strategic Plan, typically spanning five years, from formal and informal assessments; associated goals and actions inform planning at all levels of the institution, including program development, project design and adoption, budgeting, assessment, decision-making, and allocation of resources. Through its systematic process of continuous assessment (Figure 6.1) [E1-04, p. 3], the University establishes objectives according to the goals of the IU Strategic Plan, monitors how the Plan is being operationalized, responds reflectively to opportunities and challenges, and improves its programs and services. After the initial rollout of the Strategic Plan, Executive Administration reviews the Strategic Plan annually and makes any adjustments that would allow the University to respond most effectively to existing and emerging priorities. The President shares updates to the Strategic Plan at the University meetings and via email.

ANNUAL PLANNING PROCESS AND ASSESSMENT

The University comprises approximately forty institutional units, including six divisions, three colleges, eleven academic departments, and several co-curricular and supporting administrative offices. At the beginning of each academic year, all units within Immaculata develop tactics to advance the implementation of the Strategic Plan [E5-45; E4-87; E1-51; E1-52].

Each unit's tactics captured in the Annual Plan are specific, measurable, timely, and aligned with the Strategic Plan's four goals and twenty-three attendant actions. In the spring of each year, units review the strategic tactics, examine source evidence, update the status of the action, and record data and information to inform the next annual plan and actions [E6-01; E5-46].

Aligning the University Budget to the Strategic Plan and Mission

The Immaculata University budgeting process aligns with the mission and supports the Strategic Plan [E1-47; E1-03; E1-04, Table 3]. Departments across the University link budget requests to an action in the Strategic Plan. Annual budget management is a continuous process that involves all six divisions within the University; the President and Vice President for Finance and Administration provide oversight and refine the budget leading up to the final approval by the Board of Trustees [E1-01, Article 3.9].

Enrollment Management and Institutional Research personnel provide input on proposed projected enrollment levels, tuition, fees, and room and board pricing approximately one year before the start of the budgeted fiscal year [E3-01]. They submit recommendations for any changes to the Vice President for Finance and Administration for inclusion in the development of the following year's annual budget.

The fiscal year begins July 1. Over the course of the year, departments and offices propose and plan budgets for review and approval by appropriate parties:

- » In September, the President reviews the previous year budget-to-prior-year actual results with the University vice presidents. They then compare prior year actuals to the current fiscal year budget to ensure proper budgeting of known expenses. The current year budget is revised only under extraordinary circumstances.
- » Beginning in October, the Executive Administration solicits operating budget expenditure requests, personnel requests, capital requests, and recommendations for

course fees from departments in their areas. All budget requests are listed, with rationale and links to the Strategic Plan [E1-04, Appendix B].

- » During December, each department discusses requests and needs with their area vice president. The vice presidents submit any recommendations for course fee changes to the Strategic Planning and Budget Committee for review and approval [E6-02]. In spring, University vice presidents prioritize capital expenses and provide the prioritized list to the President. The Offices of Undergraduate and Graduate Admissions and deans communicate tuition and auxiliary revenue (primarily room and board) projections for the upcoming year. The Vice President for Institutional Advancement provides a projection for unrestricted contributions.
- » In March, the University vice presidents prioritize compensation and non-compensation (operating expenses) and share these with the President. The Executive Administration bases budget projections on enrollment for the upcoming year, income from all courses, anticipated operating expenses, and calculated financial covenants and proposes an annual budget. Next, the Executive Administration shares the proposed budget with the Strategic Planning and Budget Committee for review and comment [E6-02].
- » In April, the Financial Success Committee of the Board of Trustees reviews the proposed budget. This Committee examines the operating and capital budget proposals and, if satisfactory, recommends it to the full Board of Trustees for final approval [E6-03].
- » In July, the approved operating budget for the upcoming year is available to budget managers.

As a tuition-driven institution, Immaculata attends to the interplay of revenues, expenses, capital expenditures, and visionary plans. This attention to data and continuous analysis has led to the present state of a fiscally stable institution.

STRATEGIC PLAN 2017-2021

In 2016-2017 Immaculata University was in serious danger of failing to meet the debt covenants. The University's immediate priority was to stabilize the institution by refinancing the outstanding bonds and negotiating more achievable financial covenants. The University accomplished this task in 2018.

As a part of the process of refinancing bonds, Immaculata had to share its Strategic Plan to meet the covenants with the bond authority. There was no time

for a protracted process to develop the Strategic Plan. President Lettiere had just been elected President; based on her prior experience in higher education and time on Immaculata University's Board of Trustees, she developed eight key tenets of the Strategic Plan. Each vice president then created strategic objectives to address the tenets of the plan for their areas. The Strategic Plan and the associated objectives and initiatives guided the financial recovery of the institution.

The University's 2017-2021 Strategic Plan focused institutional efforts on these tenets: Academic Programming Innovations, Student Engagement/Retention, Enrollment Management Strategy, University Visibility Improvements, Facility and Technology Improvements, Capital Funding, Financial Control, and Organizational Culture and Talent Management. Over the five-year period of implementation, each planning unit of the University created tactics linked to the strategic objectives [E1-47]. The Office of Institutional Research and Effectiveness reviewed the status of objectives annually, and individual planning units submitted end-of-year assessments (EOYA) and evaluated the objectives that are linked to the Strategic Plan [E5-45; E1-51; E1-52; E5-47; E6-01].

The following is a high-level summary of the plan's achievements for each tenet.

Academic Programming Innovations: Expanding academic programs, developing partnerships, and implementing innovations were priorities in the 2017-2021 Strategic Plan. Immaculata University sought and received approval to participate in the State Authorization Reciprocity Agreement (SARA), effective as of January 2019 and maintained since that date [E3-15]. The approval of SARA expanded the opportunities for Immaculata University to offer online programs to a larger audience, prompting development of additional online programming. In addition to expanded online delivery, Immaculata launched an accelerated second-degree nursing program and several associate degree programs to meet the needs of career-changers and working adults. During this time, Immaculata developed numerous partnerships and new programs, including:

- » 5 dual enrollment high school agreements
- » 30 employer partnerships (graduate cohort locations, intermediate agreements, and discounts)
- » 23 graduate pathway programs agreements
- » 10 new academic programs

Student Engagement/Retention: Recognizing the importance of retaining students and retention's impact on University finances, the University sought to engage students in varied ways. Immaculata University's first-

time, full-time fall freshman cohort retention rate was above the overall national average, as reported by the National Student Clearinghouse for each cohort accepted between 2017-2021. The fall 2017 cohort retention rate was 74.7%, and the fall 2021 was 83.1% [E4-60]. To assist with retention and overall student success and wellbeing, the University established the Office of Learning Support Services in 2020 [E4-81]. The office comprises disability services, tutoring services, the Writing Center, and the Math Center, which were previously separate departments. The Office of Learning Support Services, under a single Executive Director, encourages cross-communication and leverages best practices to support students. Immaculata expanded usage of the Starfish application, targeting retention for adult undergraduate students and ensuring seamless interventions for all undergraduate students.

Enrollment Management Strategy: Understanding the need to attract more students, the University implemented Slate as its CRM to improve engagement with potential students. The University developed its own financial aid matrix to drive student enrollment while maximizing University resources. The Undergraduate Admissions Office implemented objectives for each admissions counselor to drive accepted students to enroll. Recognizing the opportunity for growth in the associate degree market, the University strategically reduced the associate degree tuition rate to \$250 per credit to be competitive with area community colleges. The graduate school implemented virtual open houses and interviews to support yield.

University Visibility Improvements: The University retooled its marketing efforts to engage a broader student base. The University redesigned its website and continues to expand media coverage through selected locations of billboards and targeted social media and advertising.

Facility and Technology Improvements: The University identified and addressed improvements to both facilities and technology. Selected facilities improvements included several projects mentioned above. Notable technological improvements included expanded Wi-Fi service, buyout of leased desktop and laptop computers, and implementation of the project management software FreshService.

Capital Funding: During the first four years (2017-2021) of President Lettiere's term, Institutional Advancement funded \$6 million in capital improvements, including building the IHM Student Center, an eight-lane track and field equipment, an esports facility, state-of-the-art nursing simulation lab

classrooms, and biology labs containing an Anatomage table. Additionally, a donor established a \$1.2 million STEM scholarship. During this time, unrestricted giving to the Immaculata Fund increased from \$400,000 to \$750,000 and participation from 789 alumni donors to 978.

Financial Control: Immaculata met both debt service ratio and liquidity bond covenants through strict control over expenses. The University developed a new budgeting process, revised the chart of accounts, and instituted monthly financial reporting and analysis. Immaculata implemented the purchase order module in Banner to manage anticipated expenditures to meet organizational budgets. Based on an evaluation of historical investment returns (net of fees), the University changed endowment managers to Concord Advisory Group in 2021. The University transitioned to the Philadelphia Area Independent School Business Officers Association (PAISBOA) Health Benefit Trust consortium during fiscal year 2020. The consortium provided an opportunity for the University to join a self-

funded plan that minimized increasing premium costs while providing expanded benefits to employees.

Organizational Culture and Talent Management: The University sought to strengthen its support of the faculty and staff through various means. The University implemented a health savings account, which allows employees more flexibility in managing medical expenses. The University implemented the recruiting and hiring software Interview Exchange to streamline the hiring process for both hiring managers and applicants. Immaculata introduced “Friday summer hours,” limiting the workday to 4 hours each Friday during designated weeks.

By focusing on enrollment retention, academic programs, and facilities, the 2017-2021 Strategic Plan enabled Immaculata to stabilize financially, as evidenced by consistently meeting the bond covenants through this period (Table 6.1 and Table 6.2).

Table 6.1

Bond Covenants – Debt Service Ratio

	2017	2018	2019	2020	2021	2022	2023
Debt Service Ratio	*	2.65	1.92	1.82	3.16	2.87	3.14
Debt Service Ratio Requirement	*	1.10	1.10	1.20	1.20	1.20	1.20

Table 6.2

Bond Covenants – Liquidity Covenant (\$000s)

	2017	2018	2019	2020	2021	2022	2023
Liquidity Covenant	*	\$11,409	\$ 7,958	\$12,613	\$15,153	\$14,561	\$12,807
Liquidity Covenant Requirement	*	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000

* 2017 Bonds were issued in October 2017. Beginning June 30, 2018, the University was required to be compliant with the covenants established in the 2017 bond agreement.

STRATEGIC PLAN 2022-2027

Immaculata provides in-demand academic programs in a safe, caring environment that prepares and strengthens students for leadership, service, and successful careers, delivering a strong return on their investment. In keeping with this value proposition, the development of the Strategic Plan began with stakeholder engagement [E1-03; E6-04]. The President and vice presidents facilitated conversations with their respective faculty and staff, including students when appropriate, to ensure input from across the campus [E6-05]. The Strategic Planning and Budget Committee shared input for the emerging plan during their

meetings [E6-02]. With information from the past five years of Annual Plans and research about the role of higher education in today’s culture, the Executive Administration formalized a plan based on input gathered from the participants and shared a draft Strategic Plan with University Council and the Strategic Planning and Budget Committee for comment [E6-06]. Executive Administration then sent a draft to the Board of Trustees for review and feedback. The Board of Trustees voted to approve the Strategic Plan in early fall 2022, and President Lettiere shared Immaculata’s 2022-2027 Strategic Plan with constituents in fall 2022 [E6-01].

Reflecting on the recent centennial celebration of Immaculata, President Lettiere challenged the IU community: “I invite you to join me as we embrace the future and work together to make Immaculata’s second century even mightier than its first” **[E1-03, p. 2]**. Immaculata’s 2022-2027 Strategic Plan **[E1-03]** embraces the mission of the University as its motivation and encourages the entire Immaculata community to engage creatively in promoting a vibrant and thriving institution through four strategic goals: create a distinct brand identity within a culture of inclusion; secure and develop resources to strengthen the University and its key stakeholders; achieve enrollment goal of 3,000 students and a retention rate above the national average; and enhance academic excellence through teaching and learning. The 2022-2027 Strategic Plan is posted on the University website **[E6-01]**.

Significant key performance indicators of the 2022-2027 Strategic Plan include:

- » Liquidity balance of \$5 million or greater
- » Debt service coverage ratio of 1.2
- » Progress toward 3,000 total student headcount
- » Retention rate of 85-90% for first-time full-time freshmen.

The following is a high-level summary of the plan’s achievements to date, by goal.

Create a distinct brand identity within a culture of inclusion.

Building on the accomplishments of the prior strategic plan, the University developed a comprehensive marketing strategic plan, which included **[E4-01]**:

- » Creating enhanced IU website experiences to make it easier for prospective students to find relevant information about programs, outcomes, and enrollment/transfer steps.
- » Implementing anti-melt and new student orientation promotion campaigns.
- » Sharing news and compelling stories about University programs, student outcomes, and faculty accomplishments.

Secure and develop resources to strengthen the University and its key stakeholders.

- » In conjunction with the Centennial Celebration, in late 2021, a \$6.5 million Science Pavilion campaign was successfully launched and exceeded the goal in 18 months by raising \$8.2 million.
- » During summer 2022, donors funded renovations to the first floor of the library and new program-specific areas, including a Business Lab and an Applied Technology/Cybersecurity Lab, along with several other on-campus spaces.
- » Additional donor-funded projects starting late spring of 2024 will include a \$1.8 million complete renovation to the Nazareth Dining Hall and the \$600,000 renovation of the second floor of Villa Maria for much-needed dorm space.
- » From 2022 to present, unrestricted giving to the Immaculata Fund has increased from \$750,000 to \$1.0 million, with participation increasing from 789 alumni donors to 1,155.

Achieve enrollment goal of 3,000 students and a retention rate above the national average.

- » The University recognizes the need to attain a student body headcount of 3,000 while sustaining a retention rate above the national average to ensure long-term sustainability and adequate support for University operations. Immaculata University continues to work towards this goal (Table 6.3 and Table 6.4) **[E6-07]**. As stated in Chapters 3 and 4, several initiatives have been implemented in support of enrollment and retention. Examples include the use of Slate, expansion of Starfish, development of the First@IU program, expanded market-driven degree offerings, and targeted marketing efforts.

Table 6.3
University Student Retention

	<i>Fall 2022 to Spr 2023</i>	<i>Fall 2022 to Fall 2023</i>	<i>Evidence Sources</i>
Overall Traditional Undergraduate Retention	95.5%	85.1%	E4-66, E4-67
Traditional First-time, Full-time Undergraduates	91.0%	79.5%	E4-68, E4-60
Adult Undergraduate Population	80.2%	73.9%	E4-69, E4-70
Graduate Students	93.7%	86.1%	E4-64, E4-65

Reported percentages are the retention of non-graduating, degree-seeking students.

Table 6.4
University Student Headcount 2019-2023

	2019	2020	2021	2022	2023
Traditional Undergraduate and Dual Enrollment	1017	1098	1133	1168	1225
Adult Undergraduate Population	486	516	443	340	304
Graduate	994	971	925	884	897
Institutional Headcount	2497	2585	2501	2392	2426

- » The enrollment strategy aims to attract an application pool of increased geographic diversity and academic quality. The University will accomplish this by continuing to refine the successful strategies and tactics in the 2017-2021 Strategic Plan, such as fine-tuning the financial aid matrix based on actual application and deposit results. Each admissions counselor now has objectives that the Office of Undergraduate Admissions tracks. The office has expanded its student recruitment territories by using seasonal recruiters. Working with undergraduate and graduate admissions staff, the Office of Communications and Marketing develops integrated campaigns to cultivate and nurture interested students at the traditional undergraduate, graduate, and adult degree completer levels through mail, email, social advertising, digital advertising, outdoor advertising, virtual tours, web landing pages, and more. As most campaigns drive traffic to Immaculata.edu, the website received a data-informed overhaul in 2023 so that the content and user experience better cater to prospective student needs.

Enhance academic excellence through teaching and learning:

- » Immaculata University's focus on academic excellence includes the expansion of academic programs, including the new MBA, MSN in Family Nurse Practitioner, and Bachelor of Science in Esports and Business Management. Academic departments have implemented micro-credentials within the curriculum and increased experiential learning opportunities. Faculty development programming focused on emerging topics, including artificial intelligence and diversity. Additionally, an academic program assessment is underway. Numerous examples relating to this goal are outlined within Chapters 3, 4, and 5.

Ensuring Long-Term Sustainability through Resource Planning and Financial Management

Immaculata University recognizes the significance of effective planning, resource allocation, renewal processes, and financial management to ensure long-term sustainability consistent with its mission, goals, and Institutional Priorities. The need for oversight of technology, facilities, and human resources is required to support the Strategic Plan. The University's attention to each of these areas is discussed below.

TECHNOLOGY PLANNING

Immaculata University, through the Office of Technology Services (OTS), manages an inventory of over 1,800 technology assets [E6-08]. The Vice President for Finance and Administration oversees OTS and, in concert with the President, plans for technological improvements that align with the University's Strategic Plan, mission, and overall IT priority needs (lifecycle, security, stability, etc.).

An example of recent resource allocation illustrates the effectiveness of IU's Institutional Effectiveness Model for long-term sustainability in an ever-changing technological landscape. Through the results of the spring student 2021 technology survey [E5-56, pp. 3, 5], members of the Executive Administration team became aware that Wi-Fi connectivity was spotty and unreliable for end-users. The Executive Administration team directed OTS to investigate, troubleshoot, and propose a solution. As a result, OTS identified an increased number of strategically located Wi-Fi sites across campus. The University budgeted the costs for changes to the technological infrastructure, and OTS purchased and installed additional wireless access points [E6-09; E6-10]. OTS continues to monitor campus and off-site Wi-Fi resources, ensuring the IU community has seamless and continuous Wi-Fi access.

Given the complexity and cost of IT management, in 2022, the President and Vice President for Finance and Administration realized that the legacy model of IT services and support was no longer sustainable for Immaculata, nor did it serve the needs of a modern

higher education institution. The President noted that to remain competitive and advance the institution, it was essential to restructure the IT unit to support the mission and goals of Immaculata. To address increasing cybersecurity risk, limited availability of persons with expertise essential for operations, the growing need for business intelligence, and dependency on technology for teaching and learning, the University sought proposals from external providers of IT support. Five managed services provider vendors were reviewed, and OculusIT was selected to restructure IT [E6-11—E6-13]. During the summer of 2023, Immaculata acquired new processes, procedures, and remote and on-site staffing through OculusIT to restructure the Office of Technology Services. With the implementation of appropriate IT staffing and essential security and compliance services managed by a Chief Information Security Officer and Security Operations Center, Immaculata is poised to utilize technology that further aligns with the Strategic Plan and benefits student success. Several projects and initiatives have moved ahead to benefit students and faculty, such as a computer lifecycle program, remote and classroom teaching and learning, and cybersecurity monitoring [E6-14].

FACILITIES PLANNING

The Facilities Department is another example of how IU strives to look at the sustainability of the University's resources while also addressing the sustainability of what Pope Francis calls "our common home."

Working from a prior Sightlines report [E6-15], the University identified several priority projects that required attention to adequately maintain proper functioning of facilities. Such examples included enhanced outdoor athletic facilities; upgraded HVAC system in select locations for improved energy efficiency; upgraded campus outdoor lighting to LED; and installed or replaced upgraded life safety equipment in several locations. The facilities condition report will be updated as necessary.

Facilities staff members are involved in new buildings, renovations, and other projects and look for the best sustainable products and ways to save energy for the University and the environment, including the installation of low-flow plumbing and motion sensors to turn off lights when rooms are not in use. Leveraging their various skill sets, facilities personnel have undertaken such projects as enhancing the library's student-friendly and community-strengthening learning commons, creating a business lab, and an applied technology lab, adding nursing simulation labs, as well as refurbishing Good Counsel's first floor classroom spaces [E1-49]. Academic programmatic needs identified by department faculty and academic unit leaders drove these projects and were discussed with Executive Administration.

HUMAN RESOURCES PLANNING

In support of operational effectiveness and mission achievement, the Office of Human Resources places a high priority on retaining personnel. Table 6.5 displays the faculty and staff breakdown over the most recent three-year period. Despite the pandemic, variations in enrollment, and the uncertainty brought on by external forces, the University has sought to maintain its staffing to be responsive to institutional viability and vitality.

As an employer in a highly competitive market for staff, the University has developed various initiatives to support its employees. These include summer Fridays off, remote and compressed work weeks, and salary adjustments. Instituted in May 2023, summer Fridays provide paid Fridays off between mid-May and mid-August. In spring 2023 the University began a pilot for flexible work arrangements, including remote location and compressed work week options [E6-16—E6-20]. The University continues to monitor its progress through a monthly review of employee turnover [E6-21].

Table 6.5
Immaculata University Faculty and Staff

		2020-2021	2021-2022	2022-2023
Full-time	Faculty	82	86	88
	Staff	159	162	161
Part-time	Faculty (adjunct)	146	172	155
	Staff	71	55	60

Financial Management and Control

As a tuition-dependent, private institution, the University remains attuned to the competitive landscape of higher education. Competition is a particularly looming force within the greater Philadelphia metropolitan area, as there are over 50 public and private universities within a 25-mile radius of Immaculata University (per NCES data). Considering the impending enrollment cliff and the increasing costs to provide a college degree, Immaculata carefully assesses enrollment and retention, manages resources, and maintains strong financial management and control.

The primary drivers of Immaculata's financial management and control are the bond covenants associated with the 2017 bonds. The constant monitoring of the University's financial health has resulted in meeting both debt covenants for the Series 2017 bonds. The covenants and Immaculata's performance are in Tables 6.1 and 6.2.

As Table 6.6 (next page) indicates, the University maintains a strong positive change in operating activities through diligent fiscal control

Table 6.6

Change in Net Assets from Operating Activities Before Depreciations (\$000s)

	2020	2021	2022	2023	Budget 2024
Total Operating Revenues	\$37,424	\$37,169	\$42,616	\$37,196	\$38,441
Total Operating Expenses	\$40,003	\$36,510	\$40,315	\$39,802	\$37,899
Change in Net Assets from Operating Activities	(\$ 2,579)	\$ 659	\$ 2,301	(\$ 2,606)	\$ 542
Depreciation	\$ 3,851	\$ 3,588	\$ 3,350	\$ 3,635	\$ 3,770
Change in Net Assets from Operating Activities Before Depreciation	\$ 1,272	\$ 4,247	\$ 5,651	\$ 1,029	\$ 4,312

Financial Management and Assessment

To ensure Immaculata meets the bond covenants and operating targets, the University maintains strict control over expenses and capital through extensive review and analysis of the financial results on a daily, bi-weekly, and monthly basis through various reports. The Executive Director of Finance/Controller and Executive Director of Financial Planning and Administration prepare the reports and distribute them to the President and Vice President for Finance and Administration.

The finance team reviews a daily operating cash balance report. They meet bi-weekly to review cash expended for the prior two weeks as well as a cash forecast for the upcoming two weeks. Additionally, the team meets monthly to evaluate the University's year-to-date financials compared to the budget and prior year.

The monthly review of financial assessment includes a highlights report of activity, a year-to-date statement of changes in financial position, a change in statement of activities (year-to-date versus budget and year-over-year), year-to-date actual and projected year-end cash forecast, a quasi-endowment current monthly activity report, a cash and cash equivalents report, and an

endowment market value summary [E6-22]. Planned operating and capital expenditures are modified as necessary, ensuring that the University will meet all financial debt covenants.

In its August 2022 review of the University's Series 2017 bonds, Fitch Ratings reaffirmed Immaculata's rating at BB- with a stable outlook. Fitch noted that "Immaculata's liquidity profile has stabilized, given recent improvements in debt service coverage and Fitch's expectation that the University retains capacity to maintain adequate coverage levels in Fitch's stress case scenario" [E6-23; E6-24].

The University assesses financial strength among its peers using a variety of data. Through benchmarks published in *CFO Colleague*, the University has recently begun an annual self-assessment on several measures that are indicative of an institution's financial health. The University monitors several of these measures.

One such benchmark is an institution's tuition dependency. Tuition and fees represent 87% of Immaculata's total operating revenue based on a three-year average. This remains higher than the benchmark of 75%. However, fundraising and endowment spending are other sources of funding. Over the past several years, fundraising has been largely focused on capital projects. While the endowment is valued at \$28.7

million as of December 31, 2023, the University maintains the ability to draw from it according to the investment policy. Immaculata only draws funds for scholarships but not for operations.

Another measure of institutional financial health is the University's debt service to operating expense ratio. Immaculata is above the 4% benchmark [E6-25]. This benchmark analysis presented the University with an opportunity to review its debt burden.

The President and Vice President for Finance and Administration investigated means by which Immaculata could lower its long-term debt burden. During 2023, the University re-paid approximately \$700,000 in notes payable to a university vendor. The President and Vice President for Finance and Administration also researched the ability to reduce the bonds payable. According to the terms of the bond agreement, however, the University cannot redeem any of its outstanding bonds until 2027. Additionally, the terms restrict the University from issuing any further debt, except for minimal vendor financing. As a result, recent capital projects have been funded through University institutional funds and/or donor gifts.

Another example of financial assessment is the University's salary and benefits comparison to operating expenses. The University has maintained a ratio in line with the benchmark of less than 60%. Using the position requisition process, the area vice president, the Office of Human Resources, the Budget Office, and Vice President for Finance and Administration, in concert with the President, carefully review each request for additional or backfill of faculty/staff based on the needs of current programming or University operations [E6-26].

Additional financial management measures include the implementation of a purchase ordering system for better management of departmental budgets [E6-27]. The University also participates in the Philadelphia Area

Collegiate Cooperative, which provides area universities with opportunities to obtain better pricing due to expanded purchasing capability [E6-28].

Independent Audit & Financial Viability

The Board of Trustees is responsible for selecting the University's external financial auditors and approving the audited financial statements and IRS Forms 990 and 990-T upon the recommendation of the Audit Committee of the Board of Trustees [E1-01, Article 3.9]. The Audit Committee meets at least two times a year. During the fall, the University auditors present the prior fiscal year-end audited financial statements, including the Single Audit and management letter. The auditors review the audit process and areas of focus, including financial statement highlights, as well as audit findings and related corrective action plans. During this meeting, the Audit Committee votes to approve the audited financial statements. If required, Committee members hold an executive session meeting [E1-01, Article 6.3.4; E6-29—E6-31].

In the spring, the Audit Committee meets with the auditors and the University President, the Vice President for Finance and Administration, and the Executive Director/Controller to review the audit planning process for the upcoming fiscal year. Additionally, during this meeting, the auditors review the University's IRS Forms 990 and 990-T, which require Audit Committee approval [E6-32].

In the past six years, there have been no restatements or significant audit findings. Additionally, the Department of Education's Composite Score, as shown in Table 6.7, is another indication of the University's financial viability.

By annually filing financial statements and other necessary government reports, the University complies with all applicable government laws and regulations.

Table 6.7
DOE Composite Score

	2017	2018	2019	2020	2021	2022	2023
DOE Composite Score	2.20	1.90	2.00	1.94	2.90	2.55	2.94

Utilizing Resources to Achieve Goals

The timeline for institutional planning, outlined in the Institutional Effectiveness Plan, highlights how Immaculata designs and evaluates Institutional Priorities for resource allocations [E1-04]. While the University continues to operate in a resource-constrained environment, it has not wavered in its ability to support operations and provide students with a valuable experience. Guided by the mission, the University deploys resources effectively to ensure ongoing student satisfaction, success, and goal attainment, as evidenced in exit surveys [E1-60—E1-62], graduation rates [E5-52], retention rates [E4-69; E6-33; E4-115; E4-49; E6-34; E4-60; E3-04; E4-64; E6-35], job attainment/graduate school [E5-53; E4-88; E4-90; E4-91], and licensure/certification [E5-06; E5-03].

OTS and other departments—including Human Resources, Campus Safety and Protection, Print Center, University Communications and Marketing, and Online Learning—utilize FreshService, an integrated service management platform, to report, store, manage, and assign reported technology matters through a one-stop-shop model for service requests and incidents around campus. Faculty, staff, and students can open tickets, call in problems, submit a service catalog request, or visit the Help Desk for support [E6-36].

Planning and resource allocation adequately support student success and growth. Among the initiatives supporting such allocation, Immaculata recently redesigned the administrative structure coordinating student academic support services—including disability services, tutoring, testing, mathematics and writing support—to create the Office of Learning Support Services (LSS) [E4-81]. Establishing the LSS enhanced communication among services to serve students. In addition to the administrative structure changes, the growing student need for disability, tutoring, and testing services necessitated additional testing rooms and tutoring space. In response, the LSS moved to a larger space to accommodate such needs ([Chapter 4](#)).

Assessment

Immaculata demonstrates effective assessment of planning, resource allocation, and availability of resources. Through the annual planning cycle, the University engages in a continuous cycle of developing tactics that will propel the Strategic Plan forward. Immaculata reviews, monitors, and finalizes tactics, and then evaluates them at the end of each academic year. This process is documented in the University's annual planning process [E1-04].

Examples of tactics include:

- » Successfully meeting both bond covenants
- » Effective planning through the installation of additional Wi-Fi resources
- » Effective resource allocation through deployment of purchase controls
- » Effective institutional renewal process through facility upgrades
- » Effective availability of resources through review of new and replacement faculty and staff positions

Summary

Immaculata University employs processes that systematically integrate institutional long- and short-term planning, resource alignment and allocation, and consistent involvement of participants at appropriate levels to achieve its goals and mission. Recognizing that data informs decision-making, University stakeholders know that limited resources must be used judiciously and strategically. This section documents the consistent application of that data-driven strategy to ensure that Immaculata has sufficient resources to fulfill its mission and goals. Assessment across the institution enables responsiveness to immediate needs as well as to strategic initiatives, enabling improvement of University programs and services to support actions with a vision for sustaining the institution and continuing to address opportunities and challenges effectively.

Immaculata's Strategic Plan 2022-2027 guides the direction of the University, as flexibility is needed to adapt to ever-changing market conditions. The University's plans are straightforward and concise, giving Immaculata the ability to adjust as needed and in real time.

The plan for a thriving Immaculata is centered on:

- » **Price:** With continuous competitive analysis, Immaculata assesses tuition and discount rates for market acceptance. Maximizing net tuition is key to continued financial viability.
- » **Product:** The University's programs are undergoing a complete assessment with costs, enrollment, and mission relevance criteria ([Chapter 5](#)).
- » **Promotion:** Data relevant to target markets drives marketing efforts; the website is a key marketing tool to reach prospective students.
- » **Place:** The geographical footprint of student recruitment areas is now somewhat limited. Efforts are underway to expand that footprint and to consider international recruiting.

KEY FINDINGS

- » Financial planning and budgeting at the University align with the institutional mission and Strategic Plan. Immaculata manages financial planning and budgeting effectively with appropriate institutional engagement, reflecting ethical stewardship of institutional resources.
- » With the implementation of appropriate IT staffing and essential security and compliance services provided by a Chief Information Security Officer and Security Operations Center, Immaculata utilizes technology that aligns with the Strategic Plan and that benefits student success.
- » Despite the changing public outlook on the value of higher education and the increasing costs of providing a college degree, Immaculata remains fiscally sound by carefully managing resources and maintaining strong financial control.
- » The University values its employees by expanding benefits, including a pilot of flexible work options, summer Fridays off, and additional employee benefits.
- » The annual financial audit offers important feedback on institutional processes while confirming the ongoing effectiveness of the University's fiscal management.
- » All units within the University participate in annual planning processes, identifying strategic tactics, measuring outcomes, and tracking progress/completion on those tactics. Data from the annual planning processes lead to institutional improvements.
- » The planning processes provide ample opportunity to evaluate optimal use of resources across every institutional unit.

CURRENT INITIATIVES

- » Immaculata is evaluating expansion and deployment of the purchase order system to all University departments.
- » Immaculata is evaluating enhancements to the budget process through deployment of budgeting and planning software.
- » Immaculata is optimizing existing University space to address the need for additional residential capacity.
- » Immaculata is undergoing extensive dining hall renovations through a generous donor gift.

FUTURE DIRECTIONS

Responding to the Institutional Priorities (IP), Strategic Plan (SP), and drive for continuous improvement, the evaluation of Immaculata's adherence to Standard VI's criteria led to the following opportunities for improvement/innovation:

- » Immaculata will continue efforts to address deferred maintenance and debt service while ensuring the financial sustainability of the institution with attention to enrollment, retention, endowment, and fiscal management (IP 2; SP II.4).
- » The University will ensure appropriate technology infrastructure and IT strategic planning to support and enhance the student learning environment and the efficacy of office operations (IP 2; SP II.3 and IV.5).
- » Immaculata will evaluate business processes that software can support to maximize operational efficiencies (IP 2; SP II.3).



Chapter 7: Standard VII – Governance, Leadership, and Administration

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

Standard VII: Criteria Mapping

CRITERIA	HEADING
1	Governance Structures; Role of the IHM Congregation; Administration at Immaculata; University Standing Committees & Shared Governance
2A-E	Board of Trustees
2F	President - Chief Executive Officer; President's Evaluation
2G	Board of Trustees; Assessment of Board
2H	Separation of Power and Conflict of Interest
2I	Board of Trustees; President - Chief Executive Officer
3A-C	President - Chief Executive Officer
3D	Executive Administration; Administration at Immaculata
4A-B	Administration at Immaculata
4C	Administration at Immaculata; Executive Administration
4D	Administration at Immaculata
4E	Faculty Roles in Shared Governance; Functioning of University Committees and Task Forces; Administrative Engagement
4F	Evaluation of Administration; Evaluation of University Standing Committees
5	Assessment of the Effectiveness of Governance, Leadership, and Administration
ROA 7	Board of Trustees; Governance Structures
ROA 12	Governance Structures; Board of Trustees
ROA 13	Separation of Power and Conflict of Interest

Overview

From its founding as Villa Maria College to the present, Immaculata University has maintained the centrality of its mission, through the support of governance and administrative structures that direct the daily and strategic operations of the institution. While affiliated with the Sisters, Servants of the Immaculate Heart of Mary, the University functions with appropriate autonomy as an academic institution. The institution is organized in six distinct units with administrative leaders who advance the mission and strategic goals for the benefit of its primary stakeholders, the students.

Immaculata University meets the requirements of Standard VII, its five criteria, and *Requirements of Affiliation* 7, 12, and 13. Its fulfillment of these elements is evidenced throughout this chapter.

Governance Structures

The University charter, Articles of Incorporation, and mission explicitly confirm that Immaculata's primary purpose is education [E7-01; E1-01, 1.4.2]. The Bylaws clearly articulate the transparent governance structure and delineate the roles and responsibilities of the various governing units, ensuring appropriate oversight, accountability, and autonomy [E1-01, 1.4.3].

Immaculata University is incorporated within the Nonprofit Corporation Law of the Commonwealth of Pennsylvania. The sole Member of the Corporation is the Congregation of the Sisters, Servants of the Immaculate Heart of Mary. The Member of the Corporation has certain reserved powers that require the Member's approval "for the validity of any proposed action by the Board of Trustees," which Article II of the Bylaws delineates **[E1-01, 1.4.3.2]**.

Governance of the University occurs at various levels of responsibility through the functioning of the Board of Trustees **[E1-01, 1.4.3.3]**, standing committees of the Board of Trustees **[E1-01, 1.4.3.6]**, the Executive Administration **[E1-01, 1.3.2]**, the work of the Leadership Team **[E1-01, 1.3.3]**, standing committees of the University including faculty membership **[E1-01, 1.7.2]**, Student Government Association **[E1-01, 1.6.1]**, Alumni Association and Board of Governors **[E1-01, 1.6.2]**, and other administrative entities responsive to the effective functioning of Immaculata and to the benefit of its students and other constituencies. Each of these individual structures will be discussed in more detail throughout this chapter.

Board of Trustees

The Board of Trustees constitutes the legal governing body of the University. The Board safeguards and strengthens the mission of the University and preserves the heritage of its founding Congregation. Monitoring the fulfillment of the University's mission and goals, assessing fiscal soundness, and fostering active dialogue and interaction in support of the University's mission constitute essential roles of the Board. Article III 3.9 of the University Bylaws clearly delineates the major powers and responsibilities of the Board. The Board of Trustees is responsible for high-level policy related to the mission, vision, values, programs, and services of the University and evaluating the University's performance. The Board of Trustees supports the president in maintaining autonomy of the institution through clear oversight of the University **[E1-01, 1.4.3.3]**. The number of trustees of the corporation is fixed at no fewer than twenty and no more than twenty-five members. Their qualifications, terms of office, and method of election, as well as other provisions relating to the Board of Trustees, have been prescribed within the Bylaws **[E1-01, 1.4.3]**.

The Board of Trustees functions through a committee structure enabling dialogue, communication, and oversight across functional areas; exercise of expertise as consultants; and engagement with all aspects of the University operation. The opening section of the Bylaws related to the committees of the Board of Trustees **[E1-01, 1.4.3.6, Article 6.1]** states that the committees will consist of an executive committee and five standing

committees: Academic Success Committee; Student Success and Mission Committee; Financial Success Committee; Audit Committee; and the Membership, Governance and Advancement Committee.

The IUPM Volume I defines the objectives of each committee **[E1-01, 1.4.3.6]** and establishes directives on how each committee can participate in providing oversight, guidance, and support to the University via the vice presidents who serve as liaisons between the Board and the University. The Board may convene ad hoc committees as needed. The Financial Success and Audit Committees, through their policy making rules and approval, offer strong fiscal management, which includes a regular review, in conjunction with University leadership and the external auditors, of the audited financial statements and associated documents and processes pertaining to fiscal viability **[E1-01, Articles 6.3.3 and 6.3.4]**. As evidenced through examples of the Board Agendas **[E6-32]**, the Academic Success Committee of the Board of Trustees is focused at the policy level on the awarding of degrees, approval of programs, and the quality of teaching and learning. The Committee meets regularly with the Vice President for Academic Affairs and President **[E1-01, 6.3.1]**.

The Board of Trustees provides oversight and assessment of the University through the committee structure, the presentation and acceptance of the President's annual report at the October meeting **[E1-01, 1.4.3.7, Article 7.2]**, quarterly meetings with the vice presidents serving as liaisons on Board committees, and review and discussion of major institutional policies that members of Executive Administration present **[E1-01, 1.4.3.5, Article 6.3]**. The President reviews highlights of the Annual Plan with the Board of Trustees. An example of an initiative resulting from this type of review was the implementation of the academic program assessment [\(Chapter 5\)](#).

SEPARATION OF POWER AND CONFLICT OF INTEREST

Trustees have a fiduciary relationship to the University, and they are obligated to perform their duties in good faith, in the University's best interest, and without interference in day-to-day University operations, ensuring the impartiality of the University governing body. The Board of Trustees has a clearly written confidentiality and conflict of interest statement, by which all trustees must abide **[E2-06]**. An expressed conflict of interest policy ensures that board members do not allow political, financial, or other influences to interfere with their responsibilities as board members **[E1-01, 1.5.1]**.

ASSESSMENT OF THE BOARD OF TRUSTEES

The Board conducts a formal self-assessment every three years to evaluate effectiveness of governance and support continuous improvement, with the most recent survey occurring in fall 2021 **[E1-05; E1-04, Table 4]**. The Office of Institutional Research and Effectiveness administers and compiles results from this assessment. The assessment tool enables Board members to provide their perceptions of individual performance, board effectiveness and decision-making, communication, and committee effectiveness. The assessment provides data, which informs changes to structure, communication, and board composition. In the fall 2021 survey, 75% (n=18/24) of the members participated. Responses to 59 of the 67 statements rated >4.0 of 5. Average overall statement rating was 4.40 of 5. Overall average in the 2018 survey was 4.43 of 5, indicating a consistent overall perception of the Board over this period.

In general, Board members find their work rewarding. Some Board member responses, either through comment or scaled response, suggested that membership numbers and makeup might benefit from a review, which includes the desire to increase racial diversity and to assess the number of IHM Sisters available for Board service **[E7-02]**. A supplemental table offers survey analysis of committee membership perceptions, broken down by Board Committee name **[E1-05, p. 11]**, and provides overall perceptions of committee work at the time of the assessment.

As part of its ongoing self-analysis, and in response to the assessments, the Board has made adjustments over time. In 2019, the Board approved a level of annual giving by each member **[E1-01, 1.4.3.3, Article 3.4]** to highlight members as ambassadors of the University. In 2021, the number of members and the makeup of the Board was adjusted to respond to changing needs of the University. The Membership and Governance Committee discussed committee restructuring at the January 2022 meeting **[E6-32]**. The committee structure at that time included nine committees: Academic Affairs, Audit, Enrollment Initiatives, Finance and Property, Institutional Advancement, Membership and Governance, Mission and Ministry, Student Affairs, and the Executive Committee. The proposed committee structure was recommended to place a greater focus on strategy and increase the size of the committee to facilitate a more robust discussion of the issues and to integrate functions for greater efficiency and effectiveness in data analysis and decision-making. The Board of Trustees reviewed this recommended at their meeting in April 2022 **[E6-32]** and clustered the committee functions into five standing committees: Academic Success; Audit Committee; Financial Success; Membership, Governance, and Advancement;

Student Success and Mission; and the Executive Committee. In addition to the five standing committees, an Ad Hoc Allied Health Strategic Planning Subcommittee was also created to discuss opportunities as well as plan for future growth of programs within the health professions.

PRESIDENT - CHIEF EXECUTIVE OFFICER

The President serves as the chief executive officer of the University with responsibility to the Board of Trustees for its operation **[E1-01, Article 7.2]**. The President has autonomy to manage the business and affairs of the University, as set forth in Immaculata University's Policy Manual **[E1-01, Article 3.9]**, and these management responsibilities enable the President to direct the University towards attaining its mission and strategic goals.

The IHM Sisters decided to allow for a lay president, recognizing the need to expand the pool of candidates beyond the Sisters of the Congregation. In collaboration with University Council, the Board of Trustees designed a process for the presidential search **[E1-01, 1.7.2.3.2]**. The Board of Trustees Chair selected the Chair of the Presidential Search Committee, and the IUPM guided the appointment of Search Committee members **[E1-01, 1.7.2.3.2]**. The Board of Trustees then elected, by a majority vote, the President from a list of nominees the Search Committee recommended; the Congregation approved through the General Superior of the Congregation. On July 1, 2017, following a comprehensive national search, **[E7-03]** the Board of Trustees appointed Barbara Lettiere the 10th President of Immaculata University. She succeeded Sister R. Patricia Fadden, IHM, who served in the role from 2002-2017 **[E7-04]**.

President Lettiere possesses a strong personal commitment to the University as an Immaculata alumna, a donor, and former Board of Trustees Chair. She earned a bachelor's degree in mathematics from Immaculata and continued her education by earning a Master of Arts degree in economics and statistics from the University of Notre Dame and an MBA in decision sciences and finance from Rider University **[E7-05]**. The President acquired expertise in administration and finance as a former vice president for finance at a liberal arts college and a nearly 30-year career in corporate America. As Sister Lorraine McGrew, IHM, Vice Chair of the Immaculata Board of Trustees, stated, "...as the first lay president, Barbara Lettiere will perpetuate Immaculata's long IHM heritage of preparing students for the workforce and also to be a positive force for good. She will creatively and effectively lead the University in adapting to the new and evolving educational needs of our times" **[E7-06]**.

President Lettiere's accomplishments arise from a broad spectrum of University life. Some highlights include spearheading academic programming innovations, including transitioning to the new three-college structure [E7-07], expanding academic programs [E3-46; E3-43; E7-08; E3-44], supporting a revised core curriculum, and most recently launching an academic program analysis. In the financial area, her leadership has led to improved financial stability by implementing an effective forecasting process for revenue and expenses; effectively meeting bond covenants through strong controls and fiscal management; and implementing strategic initiatives that have increased donors and capital funding. President Lettiere has directed facilities upgrades and capital projects that enhance the beauty and identity of the institution [E7-09; E7-10; E3-67]. Significant among these are new facilities and facility improvements, including constructing the Parsons Science Pavilion, IHM Student Center, and an eight-lane track in Draper Walsh stadium; creating additional state-of-the-art nursing simulation labs, an applied technology lab, and a business lab; and refreshing furnishing for Loyola Hall, Good Counsel Hall, and Gabriele Library [E1-49]. To support recruitment and retention, the President's leadership focuses on optimizing marketing efforts with robust review of the website and emphasizing enrollment management, including implementation of a customer relationship management tool, Slate, and launching a new website and a new financial aid model.

PRESIDENT'S EVALUATION

The Board of Trustees evaluates the president annually, addressing this person's ability to fulfill the responsibilities of the office, including the full authority to develop and implement institutional plans, recruit talented staff, identify and allocate resources as necessary, and direct the institution toward attaining the strategic goals and objectives as set in the University's mission and Strategic Plan [E1-01, 1.4.3.3, Article 3.9]. President Lettiere's reappointment for a second term illustrates the effectiveness of her performance.

Role of the IHM Congregation

In addition to being the sole Member of the Corporation and the founders of Immaculata University, the Sisters, Servants of the Immaculate Heart of Mary (IHM) have and continue to lend their prayerful and professional presence to this institution. Missioned to the University, Sisters serve as administrators, faculty, staff, and board members. According to the Bylaws, the IHM General Superior serves as the Vice Chair of the Board of Trustees. The Sisters serve on University standing committees, including designated seats on the three faculty elected committees. The IHMs' belief in the mission and future of Immaculata continues in tangible

ways, such as in the vital and vibrant presence of the Sisters on campus and in the continuing financial support of the IHM Congregation. The Congregation owns the land on which the University is situated as well as many of the buildings, some that bear the names of IHM leaders. The IHM Student Center is testimony to the reciprocal respect and pride that the IHMs and the IU community have for one another.

Administration at Immaculata

The University's administration structure supports the mission of the University, ensuring the proper functioning of each unit and addressing visioning, planning, implementation, and assessment at all levels. Each member of the administration possesses the skills, technological expertise, credentials, and professional experience commensurate with their role and responsibilities.

The University designed the administrative structure intentionally to ensure clarity in reporting relationships. The IU Organizational Charts provide a detailed depiction of the clearly defined organizational structure [E7-11].

EXECUTIVE ADMINISTRATION

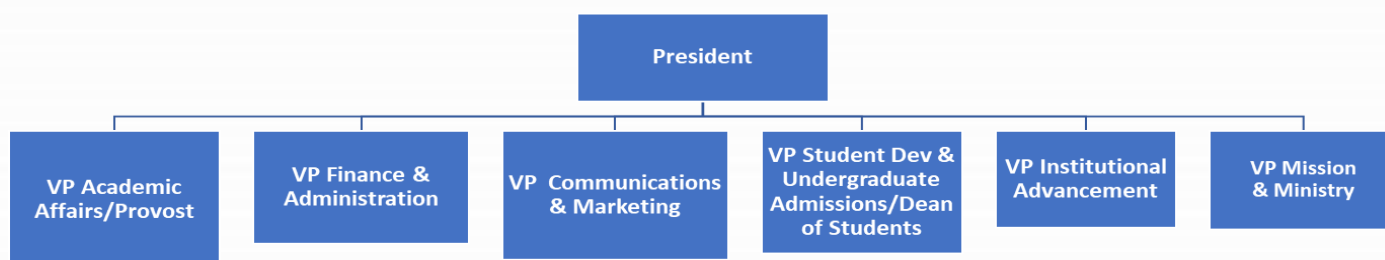
The University Bylaws describe the essential functions of the Executive Officers [E1-01, 1.4.3.7, Article 7.1], listing primary responsibilities, the structure of Executive Administration, and relationship to the Board of Trustees and University. Executive Administration oversees all aspects of operations with University-wide impact and facilitates communication and cooperation within the University community.

Qualified administrators assist the President by supporting the mission and goals of the University. President Lettiere directly oversees the Executive Administration, consisting of six vice presidents (VPs) [E7-11]. The members of the Executive Administration have appropriate educational credentials, professional training, and depth of experience needed to serve the President. Each vice president's curriculum vitae or resume highlights their credentials and professional experiences [E7-12 - E7-17].

The Executive Administration team members (Figure 7.1, next page) serve as the primary managers of University divisions and initiatives, conducting bi-weekly meetings that enable the exchange of ideas and the sharing of major challenges and updates on strategic initiatives and essential daily functions of the University.

Figure 7.1

Immaculata University Executive Administration



LEADERSHIP TEAM

The vice presidents and deans comprise the University's leadership team, which provides advice and counsel and makes recommendations to the President and Executive Administration, as needed. In addition, leadership team members periodically update Executive Administration regarding the status of their operational units [E1-01, 1.3.3].

Academic leadership team members interact with academic division leaders and department chairs [E7-18], enabling systematic communication of issues and concerns, along with efficient policy changes approved through appropriate University standing committees. Communication flows across various levels of administration and staff with relevant information shared with students. As an example, during the COVID-19 pandemic, the leadership team's collaboration ensured effective communication and support for the broad array of issues impacting University life during that period. The publication of communiques, policy changes, accommodations, training on technology, the COVID-19 Handbook, and adjustments to practices and procedures all evidence the cooperative engagement of the administrators [E2-31].

EVALUATION OF ADMINISTRATION

Individually, University administrators participate in the annual performance reviews that the Human Resources Department administers for all employees [E2-76; E2-77]. In 2023 the process moved from a paper system to a workflow using DocuSign. These annual assessments include self-rating, supervisor rating, formulation of individual goals and evaluation of goals from the prior year [E2-08, 3.8.1; E7-19] (Chapter 2). Human Resources continues to refine the process with input from stakeholders.

University Standing Committees and Shared Governance

FACULTY ROLES IN SHARED GOVERNANCE

Consistent with Immaculata's core values, both faculty and administrators share in governance and policy direction. Faculty participate in shared governance through faculty meetings, which function as an assembly of full-time faculty [E1-01, 1.7.2.1; E2-09, 4.6.1.4]. Eligible faculty members can also share in the governance and policy direction of the University by participating on committees. Immaculata University's Policy Manual Volume I [E1-01, 1.7.2] outlines the University's standing committees, including their composition and charges. Faculty elect representatives from among their members to serve on three standing committees: University Council [E1-01, 1.7.2.1.1], which allots six seats for faculty (not including the three elected alternates), as well as nine seats on Academic Personnel [E1-01, 1.7.2.1.2], and seven seats on Promotion and Tenure [E1-01, 1.7.2.1.3]. Other standing committees enable faculty participation in decision-making and engagement across the spectrum of University activities [E7-20].

University Council works with other committees in the determination and interpretation of University policy in administrative, educational, and student matters; makes possible corporate faculty participation in general governance; and functions as the executive committee of the University [E1-01, 1.7.2.1.1]. The Academic Personnel and Promotion and Tenure Committees work directly with faculty-related affairs. Academic Personnel considers policy matters [E2-09, Appendix 17], and Promotion and Tenure evaluates applications for faculty promotions and tenure [E2-09, 4.5.2].

FUNCTIONING OF UNIVERSITY COMMITTEES AND TASK FORCES

University committees provide connections across the Executive Administration, administrative staff, and the faculty for shared decision-making and information dissemination. Additional standing committees and task forces function to support the advancement of the mission in specific ways [E1-01, 1.7.2].

IUPM Volume I explains each University standing committee [E1-01, 1.7.2], describing the committee structure; distribution of members across faculty, administration, students and staff; term of service (if applicable); and a description of major areas of University life addressed through the committee functions. Table 7.1 exhibits the engagement across campus stakeholders: faculty, administrators, Executive Administration, students, and the President.

Table 7.1

University Standing Committee Membership Representation

University Committee	Faculty	Administrator	Executive Administration	Student	President
<i>Standing Committees (determined by Election)</i>					
University Council	X	X	X		X
Academic Personnel	X				
Promotion & Tenure	X				
<i>Selected Standing Committees and *Subcommittees (alphabetical)</i>					
Academic Assessment	X	X			
Academic Technology	X	X	X		
*CASTLE	X	X			
Diversity, Equity and Inclusion	X	X	X	X	
Graduate Academic Policy	X	X	X	X	
Research Ethics and Review Board	X	X			
Strategic Planning & Budget	X	X	X		X
Student Life & Development	X	X	X	X	
Undergraduate Curriculum & Policy	X	X	X	X	
Undergraduate Recruitment & Retention	X	X	X	X	
University Mission & Ministry	X	X	X		

An example of shared governance functioning effectively was addressing a concern raised regarding faculty-authored textbooks and the University's Conflict of Interest Policy. The elected faculty on Academic Personnel, made aware of the issue, shared the concern with the VPAA/Provost. The Committee Chair and VPAA/Provost consulted and determined to apprise University Council of the concern and suggest that a sub-committee of elected faculty with Academic Personnel and University Council should research and draft a policy. Based upon feedback from the faculty group, the Conflict of Interest policy was reviewed, updated, and approved per the guidelines in University Policy Manual Volume I. On behalf of the faculty group,

the VPAA/Provost emailed the revised policy to the department chairs to share with their full-time and adjunct faculty and all faculty during an announcement at the faculty meeting [E7-21; E2-08, 3.3.6 Item 8].

To ensure engagement, transparency, and communication, committees document their work through minutes and reports submitted to the Office of the President, and these documents are accessible to all faculty members upon request. Some committees report at various times to the faculty during faculty meetings. The University Council reviews all committees on a regular three-year cycle. These systematic evaluations involve reviews of committee self-appraisals and recommendations for revision of goals,

membership, and relevance. Engagement in committees enables a formal mechanism for dialogue and insight from various constituencies, fostering an environment of sharing where multiple perspectives inform decision-making [E1-01, 1.7.2.4, 1.7.2.5].

In addition to the standing committees, the University periodically appoints task forces to inform decision-making in a specific time period and to focus on a clearly defined topic or objective. One of Immaculata's strategic planning goals (2022-2027) included the development of a new college structure, effective fall 2023 [E1-03, Goal 1]. This new structure includes the College of Nursing and Health Professions, the College of Undergraduate Studies, and the College of Graduate Studies and Research. The President created a University task force of twenty-four members, with representation from the Board of Trustees, faculty, and administration and led by the VPAA/Provost. Its charge was to provide input and collaboration in guiding the University in the continued realization of the mission through an examination of a new college structure that would align with the University's Strategic Plan initiatives [E7-22]. The task force recommended a four-college structure to the Executive Administration [E7-23]. After consideration of the recommendation, the Executive Administration determined that current priorities centered on consolidating support for the undergraduate populations and marketing to meet the burgeoning demand for health-related programs. As a result, the Executive Administration formulated and endorsed the final three-college structure, which the Board of Trustees approved [E7-07].

STUDENT PARTICIPATION IN UNIVERSITY GOVERNANCE

According to its constitution found in IU Policy Manual Volume I, the Student Government Association (SGA) exists "to provide an opportunity for every student of the College of Undergraduate Studies of Immaculata University to develop his or her individual character, personality, and capacity for leadership to the highest possible degree through the exercise of personal and group initiative, resourcefulness, and responsibility in the conduct of student affairs" [E1-01, 1.6.1.1.2]. Responsive to the mission's call for "formation of the whole person for leadership and service," SGA membership includes full-time undergraduate students and provides them with a voice in matters of student life and activity. The Student Council, composed of elected class officials, is the executive power and official representative of the SGA.

In addition to their engagement in the SGA, students also participate in committee structures. The DEI Committee and several other University standing committees include designated roles for student

representatives [E7-20]. Additionally, the Board of Trustees invites students to participate annually in meetings with trustees [E7-24].

ALUMNI ASSOCIATION AND ALUMNI ASSOCIATION BOARD OF GOVERNORS

The purpose of the Immaculata University Alumni Association (IUAA) is to serve and to promote the mission, Strategic Plan and the mutual interests of Immaculata University and its alumni with and in collaboration with the Offices of Alumni Relations and Institutional Advancement. In support of the University's mission, the Alumni Association provides opportunities to create meaningful relationships with alumni and the Immaculata community through ongoing commitment, communication, and connection. The IUAA Board of Governors oversees all IUAA policies and transacts all of its business [E1-01, 1.6.2.1.4].

EVALUATION OF UNIVERSITY STANDING COMMITTEES

The University Council Committee's three-year review cycle provides regular evaluation of University standing committees [E7-25; E7-26]. University Council works with other committees in the determination and interpretation of University policy in administrative, educational, and student matters; makes possible corporate faculty participation in general governance; and functions as the executive committee of the University. An example of University Council's work included discussion and approval of the Diversity, Equity, and Inclusion Committee to aid in student engagement and retention [E7-27, p. 10; E7-28].

Beginning in fall 2023, the Vice President for Academic Affairs began collaborating with elected members of Academic Personnel and University Council, creating a faculty workgroup to review the current standing committees, generate ideas for an updated structure, and create a proposal for a new standing committee framework for the University. The faculty workgroup is examining the elected standing committees and investigating interest in the possible development of a Faculty Senate. Through this initiative, the workgroup is also exploring the effectiveness of formal faculty meetings and informal faculty coffeehouses. The faculty workgroup has engaged with the full faculty, with support from the Vice President for Academic Affairs, as part of continuous improvement [E7-29].

Administration Engagement

As evidenced through the University Standing Committee composition, engagement among stakeholders is woven throughout the University's fabric. The University administration regularly engages with stakeholders in advancing the institution's goals and

objectives. Several avenues of communication inform and engage the campus community: University Meetings [E2-35], Letters from the President [E2-24] and *Dome Digest* electronic communication [E2-27—E2-29] ([Chapter 2](#)).

ENGAGING WITH FACULTY

In addition to engagement with faculty through the University standing committees, University administrators engage with faculty through faculty meetings, the VPAA/Provost's faculty coffeehouses, and email communications. These gatherings offer faculty and administration a platform to share news and updates about activities within Academic Affairs and the institution as a whole. Such events encourage productive dialogue and include opportunities for questions, comments, and discussions. They create a space for faculty and staff to engage in informal interactions and stay informed about the latest developments [E2-26].

EXECUTIVE ADMINISTRATIVE ENGAGEMENT WITH INSTITUTIONAL POPULATIONS

Members of the Executive Administration interact with appropriate institutional populations in a variety of ways; examples include:

- » **VP for Academic Affairs/Provost:** In addition to regular communication and engagement with faculty, the VPAA/Provost organizes "Academic Affairs Updates" events and email communications. The VPAA/Provost meets bi-weekly with all direct reports, facilitates bi-weekly academic deans' meetings, and hosts virtual meetings three times each semester that include all non-faculty employees within Academic Affairs. Individuals are encouraged to share information, provide feedback on initiatives, and offer suggestions for improvement.
- » **VP for Institutional Advancement:** The VPIA holds monthly all-staff meetings to provide updates on institutional and departmental activities, as well as new initiatives. Between meetings, the VPIA shares pertinent updates with Institutional Advancement staff through email and brief in-person communication. This regular communication keeps the staff informed and fosters a sense of engagement. Additionally, the VPIA hosts a series of On the Road (OTR) events each year that are open to all alumni within key geographic areas. These regularly scheduled gatherings serve as opportunities to strengthen connections with alumni, share institutional updates and initiatives, and further the mission and goals of the University. In 2023, Institutional Advancement planned 25 OTR events, 7 virtual events, and 6 affinity events, along with various

other events and activities to engage alumni [E7-30; E7-31].

- » **VP for Student Development & Undergraduate Admissions:** The VP for Student Development & Undergraduate Admissions conducts monthly department meetings that involve associate deans and directors. These meetings serve as collaborative platforms to review policies, provide feedback from past events, and update attendees on future events. They also serve as an opportunity to seek professional staff engagement for activities and events. The regular meetings enable the department to stay aligned, share information, and foster teamwork [E7-32].
- » **VP for Finance and Administration:** The VPFA follows a bi-weekly meeting structure with direct reports, who then meet with their respective staff. This cascading communication approach allows for effective sharing of information and encourages discussions. These meetings help keep the staff updated on important matters and provide a platform for engaging in conversations related to finance and administration [E1-01, 7.5].
- » **VP for Mission and Ministry:** The VPMM holds regularly scheduled meetings with the Campus Ministry Director and with the Campus Ministry staff. The VPMM provides mission orientation mornings for new faculty in the fall. Staff members individually receive an hour-long mission orientation shortly after they are hired [E1-11]. The orientation consists of three sections: the IHM founding history, the IHM charism, and the story of Immaculata's founding. The VPMM conducts mission statement reflections throughout the year for departments, with each session lasting about a half hour. In 2022-2023, the VPMM conducted 22 department sessions with a total of 119 participants [E1-14]. While most of the 2022-23 sessions involved staff members, the VPMM provided several of these reflections for academic departments, such as the Education Division.
- » **VP for Communications and Marketing:** The VP for Communications and Marketing strengthens the University's shared vision by continuing to build and solidify connections and collaborations between the communications and marketing team and other internal and external stakeholders. The VP holds regular meetings with the undergraduate admissions and graduate admissions/leadership teams to discuss needs, ideas, projects, strategies, progress toward strategic goals, etc. [E7-33]. A primary aim of these meetings is to ensure all marketing, admissions, and academic support teams are aware of and working toward common institutional goals and that all faculty and staff stakeholders are aware of marketing, promotional, and outreach efforts to minimize duplication of

efforts and maximize efficiencies. Additionally, the VP for Communications and Marketing periodically meets with groups of key academic stakeholders (program directors, deans, etc.) to share objectives, key project updates, work process details, and more [E7-34]. The VP also ensures timely dissemination of news [E2-45], alerts, and other information to staff and faculty by overseeing the production and distribution of weekly/bi-weekly newsletter emails [E2-27—E2-29] and urgent communications and updates to the website.

ENGAGING WITH STUDENTS

Members of Immaculata University's administration regularly engage with faculty, students, and constituents to advance the University's mission through an interrelated system of exchanges. Students experience the administration's support and presence at academic and extracurricular activities. An example of this includes staff participation in admissions open houses, Undergraduate New Student Orientation, Immaculata's Research Symposium, and the Graduate Student Advisory Board.

- » The Undergraduate New Student Orientation showcases Immaculata's welcoming spirit to new members of the community. Student Development and Engagement leads the event, and every vice president's area provides an integral part. Current students begin each year by developing an orientation theme, and new students participate in a robust program that includes interactions with faculty, staff, and students. The service component embedded in the orientation program presents new students with their first opportunity to live Immaculata's mission [E4-40].
- » Immaculata's Research Symposium, Posters Under the Dome, is an annual event that highlights student research conducted with faculty mentors. Students exhibit their research results to the campus community [E7-35]. In addition to stakeholders on campus, the University invites donors and the Board of Trustees to attend the event and learn about the scholarship students conduct [E7-36].
- » The Graduate Student Advisory Board is composed of graduate students and administrators from the College of Graduate Studies and Research. The board meets once each semester to discuss topics of interest or concerns of graduate students and to share University updates. In fall 2022, the advisory board discussed students' orientation experiences, which each academic program facilitates. The board determined that the separate orientations did not provide a consistent overview of campus resources across programs. Based upon graduate student

feedback, the College of Graduate Studies and Research hosted its first virtual student orientation in fall 2023, serving all new graduate students and supplementing the programmatic orientation that continues within each area [E4-106; E4-56].

Beyond the specific examples above, administrators support student life regularly through attendance at sporting events, musical performances, theater productions, and similar programming. Overall, these initiatives demonstrate the University administration's commitment to fostering communication, engagement, and collaboration among faculty, staff, and stakeholders. By providing opportunities for interactions, such as coffeehouse events, updates, meetings, and alumni gatherings, the University administration creates a sense of community, openness, and connection.

Assessment of the Effectiveness of Governance, Leadership, and Administration

In support of continuous improvement, the University has defined processes to facilitate periodic assessment that are detailed in Immaculata's Institutional Effectiveness Plan [E1-04]. The assessments provide for reflection, prompt discussion, and identify opportunities for improvement. University governance is periodically reviewed through the self-evaluation of the Board of Trustees (every three years) and assessment of University standing committees (every three years). Both the Executive Administration and the University Council review the IU Policy Manuals comprehensively at least every three years and update individual policies as warranted to ensure the manuals remain relevant and accurate ([Chapter 2](#)).

The administration is assessed annually through the performance evaluation process facilitated by Human Resources, as well as periodic employee engagement surveys, which provide a pulse on the employee campus climate [E2-76; E2-77; E1-63].

All units within Immaculata participate in driving the Strategic Plan forward through the annual planning process [E1-04, Section V]. Conducted at the unit or department level, this process follows an annual cycle that begins with the creation of Annual Plans and culminates in documentation and review of each plan. Immaculata comprises approximately forty institutional units, including Immaculata's six divisions, three colleges, and several academic departments, co-curricular offices, and supporting administrative offices. At the beginning of each academic year, all institutional administrative units reflect on actions they can take to propel the Strategic Plan forward. Each unit captures its reflections and proposed actions in an Annual Plan that

responds to the Strategic Plan in the form of two to five strategic tactics. Through the year, vice presidents assess administrative units in their area, and those measurements include the units' progress on their annual plans. The Office of Institutional Research and Effectiveness combines all unit-based Annual Plans into an institutional master Annual Plan [E5-45; E1-51], with progress on unit-level tactics reviewed relative to the overall Strategic Plan.

Summary

The governance structures delineate how the University is governed and administered, enabling the recognition of its mission and the achievement of its strategic goals for the benefit of the institution, its students, and stakeholders. The institution responds to internal and external factors to support the University's Strategic Plan using its administrative structures as vehicles for consistent and responsive implementation. Evaluating the effectiveness of institutional structures has led to such initiatives as the creation of the new college structure, the creation of the office of the VP for Mission and Ministry ([Chapter 1](#)), and the introduction of OculusIT for technology management ([Chapter 6](#)). These governance structures provide stability so that the institution can operate effectively and that it has the flexibility to operate with autonomy through its use of committees, avenues of dialogue with stakeholders, and processes to gather input and data. Student educational attainment and success remain the primary focus of the University, and all aspects of governance support this priority.

KEY FINDINGS

- » Immaculata University's charter and mission confirm education as the University's primary purpose; Bylaws define structures ensuring appropriate oversight and autonomy within its operations.
- » The IHM congregation embraces the university's mission in tangible and spiritual ways, seen clearly in the vital presence of Sisters in campus life and continuing financial support.
- » The Board of Trustees safeguards the University's mission, assesses fiscal soundness, and fosters active dialogue amongst the membership. The BOT functions through various committees and conducts regular self-assessments. Trustees maintain a fiduciary relationship with the University, ensuring impartiality and non-interference in day-to-day operations. Members sign and adhere to a clearly delineated conflict of interest statement.

- » Qualified administrators support the President and oversee various University divisions. Regular meetings and communication channels contribute to alignment of goals and action.
- » Faculty participate in governance through the University committee structure. Membership on University Council, Academic Personnel, and Promotion and Tenure Committees provides for elected representation from the faculty. Shared governance invites faculty input in decision-making processes.
- » Administrators model transparency, collaboration, and engagement among employees and students through regular meetings and events, contributing to a sense of community and shared vision.
- » Immaculata's leadership utilizes data-driven decision-making in all facets of University operations in alignment with the IEP and including regular evaluation of leadership and governance structures.

CURRENT INITIATIVES

- » In an ongoing effort to improve transparency and cultivate a culture of continuous dialogue, the Human Resources Department revamped the performance evaluation process. This change involved offering information sessions on the logistics for employees and supervisors, creating office hours dedicated to help employees set goals, and implementing a thorough review process.
- » To meet the burgeoning demand for health-related programs and because of its assessment of current structures, the University established the College of Nursing and Health Professions, operative in fall 2023, as one of its administrative units.
- » At the request of the VPAA/Provost, six elected faculty members from University Council and Academic Personnel volunteered to serve as a faculty work group beginning in fall 2023 to examine faculty engagement in shared governance.
- » The University continues to foster a responsive and informed Board and Executive Administration culture that can respond expeditiously to changes in the educational landscape, technology, and student needs.

FUTURE DIRECTIONS

Responding to the mission, Institutional Priorities (IP), Strategic Plan (SP), and drive for continuous innovations, the evaluation of Immaculata's adherence to Standard VII's criteria led to the following improvements and innovations:

- » As communication tools change and evolve, the University encourages its leaders to leverage new mediums to augment communication with stakeholders (IP 2; SP II.1).
- » Continuing its earlier assessment results, the Board of Trustees will explore avenues for increasing diversity in its composition (IP 2; SP I.4).
- » The University will prioritize ongoing professional development for faculty and administrators to keep pace with technological advancements and evolving educational methodologies. This education will help University employees acquire new skills and adapt to the change(s) in their role (IP 2; II.3 and IV)

Conclusion

Immaculata University's self-study process has provided myriad opportunities for reflection and rich discussion across the campus. Researching the components of the document affirmed that IU lives its mission and engages with its Strategic Plan. As the findings of this Self-Study demonstrate, the interconnectedness of the University's mission and the Strategic Plan finds expression in their alignment with Immaculata's three Institutional Priorities:

1. Retain and foster institutional commitment to **formation of the whole person in an ever-changing and diverse society**.

Reflecting the spirit and ongoing dedication of the IHM Congregation, IU faculty, staff, administrators, and the Board of Trustees dedicate their energies and efforts to support the success of IU students. Whether through expanded academic support services, student life programming, campus ministry or community outreach, the goal remains the preparation of IU students for service to the wider community. The University increasingly focuses on inclusivity by incorporating diversity and inclusion in teaching, learning, and research in support of a campus culture that welcomes all.

2. Ensure **institutional viability** through data-driven decision-making and responsible stewardship of **institutional resources**.

Employing strong fiscal controls and risk management strategies, Immaculata ensures its ongoing viability through good stewardship of resources, strategic planning, and data-driven decision making that reflect reasonably and realistically on the challenges of higher education in an increasingly complex market.

3. Provide an **innovative teaching and learning environment** so as to engage our students in a vibrant educational experience.

The Self-Study demonstrates Immaculata's commitment to and assessment of academic and co-curricular programs that are relevant and aligned with the institutional mission. In addition, increased opportunities for experiential learning, undergraduate and graduate research, and expanded academic partnerships contribute to the innovative teaching and learning environment.

The core team, seven standard work groups, steering committee, and key stakeholders carefully evaluated the University's alignments with the standards, documenting the many ways in which Immaculata lives out those criteria. In the process the team identified opportunities which will support the University as it continues to be a vibrant, relevant, and resilient institution. As the Immaculata community looks ahead, communicating effectively, listening to internal and external constituents regarding emergent issues, and continually examining internal structures and processes will ensure ever-strengthening engagement for IU constituents.



Responsive to the University's mission, Strategic Plan (SP) goals, and Institutional Priorities (IP), Immaculata University has identified the following future directions:

Mission and Goals

- » Recognizing an opportunity to expand mission engagement, the University will intentionally invite adult undergraduate and graduate students to IU mission-based activities (e.g., CGSR's newsletter) (IP 1; SP I.3 and III.5).
- » The VPMM will investigate a time schedule, in collaboration with the Board of Trustees, to ensure a formal review of the mission statement and core values of the institution (IP 1; SP I.1).
- » Through campus leadership and committee work, the University will reinforce and further express its Catholic identity as central to its mission, across all aspects of the institution, by advancing initiatives and efforts related to inclusion (IP 1; SP I.4 and IV.1).

Ethics and Integrity

- » Acknowledging the increased discourse nationally regarding academic freedom, the University will investigate a mechanism to address academic freedom-related topics associated with the policy stated in IUPM Volume II (IP 1; SP I.4 and IV.2).

Design and Delivery of the Student Learning Experience

- » The University will expand use of simulation across campus, as a teaching strategy, for interdisciplinary learning experiences (IP 3; SP IV.5).
- » As generative AI becomes a larger presence globally as well as in learning spaces, the academic area of the University will foster the ethical and effective use of artificial intelligence in the design and delivery of the student learning experience (IP 3; SP IV.5).

Support of the Student Experience

- » The culture of institutional assessment is visible throughout campus; however, it is noted that an expansion of assessment measures of co-curricular activities could provide additional information on student growth and development (IP 1; SP II.3 and III.3).
- » With the expanding presence of diverse populations, Immaculata will implement direct assessment measures examining student success and will design responsive strategies

so that the University can serve all students, consistent with the mission (IP 1; SP III.3).

- » To maximize developments in technology impacting the student experience, the institution will explore and support initiatives responsive to change (IP 3; SP II.3, III.4, and III.5).

Educational Effectiveness Assessment

- » While the University has robust practice for sharing the results of 5-Year Program Reviews with academic departments and administrators [E5-21; E3-105], report data should be shared beyond the academic unit. Findings may assist other areas, such as marketing, admissions, and SD&E, in supporting recruitment, retention, and holistic education of IU students with even greater efficiency (IP 2 and 3; SP IV.2).
- » Implementing data from the Strategic Academic Program Assessment (2023), Immaculata will provide mission-driven and market-relevant academic programs (IP 2 and 3; SP II.3 and IV.2).

Planning, Resources, and Institutional Improvement

- » Immaculata will continue efforts to address deferred maintenance and debt service while ensuring the financial sustainability of the institution with attention to enrollment, retention, endowment, and fiscal management (IP 2; SP II.4).
- » The University will ensure appropriate technology infrastructure and IT strategic planning to support and enhance the student learning environment and the efficacy of office operations (IP 2; SP II.3 and IV.5).
- » Immaculata will evaluate business processes that software can support to maximize operational efficiencies (IP 2; SP II.3).

Governance, Leadership, and Administration

- » As communication tools change and evolve, the University encourages its leaders to leverage new mediums to augment communication with stakeholders (IP 2; SP II.1).

- >> Continuing its earlier assessment results, the Board of Trustees will explore avenues for increasing diversity in its composition (IP 2; SP I.4).
- >> The University will prioritize ongoing professional development for faculty and administrators to keep pace with technological

advancements and evolving educational methodologies. This education will help University employees acquire new skills and adapt to the change(s) in their role (IP 2; SP II.3 and IV.4).

These future-focused initiatives above are currently part of the institutional conversation and planning, which support continuous improvement. The University's responsiveness to the study's findings demonstrates its ongoing commitment to building a community centered in mission, dedicated to academic excellence, engaged in ethical practices, and committed to employing data for future-focused decision-making. The energetic engagement of the entire community throughout the self-study process underscores and strengthens Immaculata's intentional, strategic efforts to be a force for positive change and transformational education.