

# Winthrop Plan 2016 - 2021

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A FIVE-YEAR ADMINISTRATIVE REVIEW

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## **Winthrop Plan 2016 – 2021**

### **Executive Summary**

During the 2015-2016 academic year then president Dr. Daniel Mahony led the university faculty and staff in developing a five goal strategic plan that was to guide the university for the next ten years. With Dr. Mahony's departure and with the expected arrival of president-elect Dr. Edward Serna on July 1, 2022, it was an appropriate time to conduct a five year administrative review of what has become known as the Winthrop Plan. Generally speaking, Goal Five, "Ensure financial stability and sustainability" was deemed most successful as 65% of the goal targets were achieved. Conversely, only 40% of Goal One, "Support inclusive excellence by expanding our impact on students and our communities through enrollment growth and increases in retention and graduation rates" were met. More specifically and using criteria of the majority of the target metrics under a goal being met over the five years, it can be concluded that eight target metrics were met over the five year period while six target metrics were not met. Examples of target metrics that were met included scholarships provided by the Winthrop University Foundation, lower debt ratio, the number of new/redesigned programs, number of hybrid/online programs and number of classrooms with upgraded technology. Those target metrics that were consistently not met included alumni giving rate, student satisfaction with support services, expenditures on facilities, enrollment and one-year retention rate among others. Among the faculty and staff who responded to a survey about the Winthrop Plan it was noted with some pride that they felt that the Goal 1 metric related to percentage of students and faculty/managerial staff who are diverse was achieved. However, disappointing progress was noted regarding Goal 3 metric of percentage of full-time employees with salaries at or above the median. While the metric analysis and qualitative information provided by the survey paint a point-in-time picture of what the Winthrop Plan has and has not achieved, it should be recognized that with the transition in the university president, the Winthrop Plan and its associated metrics may be changed, expanded or eliminated as appropriate as Dr. Serna crafts his vision and goals for the strategic plan that will characterize his tenure as president at Winthrop University.

## **Winthrop Plan 2016 – 2021**

### **A Five-Year Administrative Review**

All institutions profit from the creation of a strategic vision and a plan on how to achieve that vision. Over the its 137 years Winthrop University has been guided by the vision and strategic plans of its senior leadership. In preparation of its next transition in leadership it was deemed appropriate to conduct an administrative review of the strategic plan that guided the institution through its most recent history.

#### **Development of the Winthrop Plan**

In the 2015 – 2016 academic year, Winthrop University developed a strategic plan under the leadership of then president Dr. Daniel Mahony, That plan was intended to guide the university through 2025. The Winthrop Plan, as it came to be known, focused on five critical goals building upon previous success and ensuring long-term growth and progress. Working Groups were charged with researching and recommending five to ten action items to advance each goal and identifying metrics to assess progress. Action Groups formed to support each goal and develop targets for each goal's metrics, with 2016 serving as the baseline year for Winthrop Plan metrics. The following goals were included in the Winthrop Plan.

Goal 1: "Support inclusive excellence by expanding our impact on students and our communities through enrollment growth and increases in retention and graduation rates."

Goal 2: "Continually enhance the quality of the Winthrop experience for all students by promoting a culture of innovation with an emphasis on global and community engagement."

Goal 3: "Attract and retain high quality and diverse faculty, staff and administrators."

Goal 4: "Provide facilities, technology, and programs that support Winthrop students and the overall Winthrop experience."

Goal 5: "Ensure financial stability and sustainability."

In Summer 2021, Dr. George Hynd, interim president recognized the need to revisit the Winthrop Plan and prepare a five-year progress report. It was concluded that an internal administrative review was the appropriate vehicle to provide the information needed to judge the progress that may have been achieved since the launch of the Winthrop University Strategic plan. In addition to reviewing the institution's progress in achieving its goals over the five-year period it was also of interest to conduct a survey of employees to gauge opinions regarding the Winthrop Plan's metrics, targets, and planning process. It is anticipated that this five-year administrative review will be of value to Dr. Edward Serna, president-elect of Winthrop University as he considers his vision, goals and new strategic plan for Winthrop.

## Organization of the Administrative Review

This report addresses three major assessment components. First, the progress of each plan metric through Summer 2021 will be summarized, followed by a presentation of key takeaways of the Winthrop Plan Feedback Survey results. Finally, to inform the discussion regarding any future targets and stretch targets, statistical analysis was performed by Institutional Effectiveness (IE), formerly the Office of Accreditation, Accountability, and Academic Services (AAAS).

## Five-year Summary of Performance by Goal

Goals within the Winthrop Plan have varying numbers of metrics to assess progress – some Goals have as many as five metrics and some have as few as three. Additionally, though most metrics are able to be updated every year, three are only able to be updated every other year and one has data available only for one year. Below, progress for every Goal's metrics are presented in descending order of success in meeting targets, with Goal 5 presented first with the highest rate of meeting targets at 65%. Definitions for each metric appear in Appendix 1 and every year's actual values, targets and stretch targets appear in Appendix 2: Table 1, located at the end of this report.

### Goal 5: Ensure financial stability and sustainability

Table 2 presents the progress toward each of the five metric targets for Goal 5 in decreasing order of success.

Table 2 - Performance Summary for Goal Five: Ensure financial stability and sustainability.			2016-17 / FY17	2017-18 / FY18	2018-19 / FY19	2019-20 / FY20
Scholarship/grant dollars provided to students from U and Foundation			🟢 \$20,000,000	🟢 \$21,000,000	🟢 \$21,000,000	🟢 \$20,800,000
Debt Ratio			🟢 0.48	🟢 0.45	🟢 0.41	🟢 0.37
Total Endowment Assets			🟢 \$51,400,000	🟢 \$55,600,000	🟢 \$59,000,000	🔴 \$58,900,000
Unrestricted Gift Revenues			🟢 \$567,786	🔴 \$270,147	🟢 \$714,437	🔴 \$387,316
Alumni Giving Rate			🔴 7.0%	🔴 3.2%	🔴 5.1%	🔴 4.4%
Stretch Target met	🟢	Target met	🟢	Neither target met	🔴	

Of the 20 opportunities for Goal 5 metric targets to be met, they were met 13 times, for a target success rate of 65%. Additionally, of the 20 opportunities to meet stretch targets, they were met seven times, for a stretch target success rate of 35%. Of the five metric targets for Goal 5, two met their target every year: **Scholarship/grant dollars provided to students from University & Foundation** and **debt ratio**. Targets for **total endowment assets** were met three of four years. Targets for **unrestricted gift revenues** were met two of four years. Stretch targets were also met for **scholarship/grant dollars provided to students from University & Foundation**, **debt ratio**, and **total endowment assets** in two of four years. No target or stretch target for **alumni giving rates** was ever met.

Going forward, important takeaways were observed in the employee survey results regarding Goal 5 of the WU Plan Strategic Plan. First, though two metrics met their targets every year, only one had support for more aggressive 2025 targets, **scholarship/grant dollars provided to students from University & Foundation**. Both the 2025 targets and stretch targets for this metric were seen as “too low”. Because of its positive impact on attracting and retaining students, increased **scholarship/grant dollars provided to students from University & Foundation** was seen across many respondents’ comments as a critical lever to improve financial stability and sustainability. Additionally, though Goal 5 metrics had the most success meeting targets, this goal had the lowest reported involvement among respondents with 60% feeling uninvolved with Goal 5 metrics. Still greater success meeting Goal 5 metric targets may be achieved by exploring ways to enhance employees’ sense of involvement around the metric outcomes. Finally, all but one of Goal 5 metrics are predicted to move in the desired direction according to IE forecasts, with **scholarship/grant dollars provided to students from University & Foundation** and **debt ratio** forecast to meet the 2025 stretch targets. On the other hand, **alumni giving rates** are forecast to continue to move in the undesired direction. This metric deserves focused attention to stabilize or improve it in the future as this likely will not only positively affect engagement with alumni and contributions from alumni, but also US News and World Report rankings as the alumni giving rate contributes 3% to an institution’s score. Full survey results and forecasts are presented in Appendix 3, Tables 12, 28 – 33 and 59.

**Goal 2: Continually enhance the quality of the Winthrop experience for all students by promoting a culture of innovation with an emphasis on global and community engagement.**

Table 3 presents the progress toward each of the four metric targets for Goal 2 in decreasing order of success. Of the 11 opportunities for Goal 2 metrics to meet targets, they were met seven times, for a success rate of 64%. Additionally, of the 11 opportunities to meet stretch targets, they were met three times for a stretch target success rate of 27%. Of the four metric targets for Goal 2, one met its target every year: **number of new and/or substantially redesigned programs**. The remaining Goal 2 metrics only have data available to update every other year rather than every year: **National Survey of Student Engagement (NSSE) Diversity Indicator, percent graduating with two or more high-impact practices** and **NSSE Student-Faculty Engagement Indicator**. The targets for **NSSE Diversity** and **Student-Faculty Engagement Indicators** were met for one of two years. Stretch targets were met for **number of new and/or substantially redesigned programs** in two of five years and for **Student-Faculty Engagement Indicators** in one of two years. Neither target for **percent graduating with two or more high-impact practices** was ever met.

Table 3 - Performance Summary for Goal Two: Continually enhance the quality of the Winthrop experience for all students by promoting a culture of innovation, with an emphasis on global and community engagement.		2016-17	2017-18	2018-19	2019-20	2020-21
Number of new and substantially redesigned programs developed in support of institutional goals		● 3	✓ 8	✓ 9	● 9	● 11
		2016 NSSE - WU Seniors		2018 NSSE - WU Seniors		
NSSE Student-Faculty Interaction indicator		✓ 49%		✗ 46%		
NSSE Diversity Indicator		● 79%		✗ 78%		
% of undergraduate students who graduate with at least two high impact practices.		✗ 70%		✗ 69%		
Stretch Target met		✓	Target met	●	Neither target met	✗

Going forward, important takeaways were observed in the employee survey results regarding Goal 2 of the WU Plan Strategic Plan. First, though the targets for **number of new and/or substantially redesigned programs** were met every year, a majority indicated the 2025 targets and stretch targets were “too high.” Should 2025 targets and stretch targets be kept for this metric, enhanced messaging to campus may be needed to improve understanding why existing long-term targets are justified as well as how the metric is defined, measured because open-ended comments expressed some confusion around how a program is defined and what constitutes redesign. Forecasts were mixed for Goal 2 metrics with just two predicted to move in the desired direction, **number of new and/or substantially redesigned programs** and **Student-Faculty Engagement Indicators**, though neither were forecast to meet 2025 targets or stretch targets. **NSSE Diversity Indicator** is predicted not to change and **percent graduating with two or more high-impact practices** is predicted to move in the undesired direction. Full survey results and forecasts are presented in Appendix 3, Tables 12, 34 – 38 and 59.

Before moving to the next Goal, it seems important to point out that three of the four metrics are available only every three years with those metrics coming from the NSSE survey. This is mentioned to put the success rate of 64% in context. If these metrics were available as frequently as most other metrics, the success rate might have been lower especially considering all three NSSE metric targets were not met the last time it was administered. As it stands, there were 11 opportunities to meet targets but if data had been available in 2020-21, there would have been 14 opportunities. And if targets had been met the same number of times, seven, then the success rate would have been 50% instead of 64%. At the time they were chosen, these metrics were available every other year rather than every three years and would have been available in 2020-21. In light of this change in schedule of metric availability, it may be worth considering whether this three-year schedule of assessing success toward targets is acceptable. Additionally, these NSSE metrics are highlighted because many respondents pointed out

more direct measures may be preferred for **percent graduating with two or more high-impact practices**.

Specifically, respondents suggested participation in high-impact practices be measured directly, possibly through coursework, rather than indirectly through NSSE survey questions. Direct measures have the added benefit of being available more frequently.

**Goal 4: Provide facilities, technology, and programs that support Winthrop students and the overall Winthrop Experience.**

Table 4 presents the progress toward each of the four metric targets for Goal 4 in decreasing order of success. Of the 16 opportunities to meet Goal 4 metric targets, they were met nine times, for a success rate of 56%. Additionally, of the 16 opportunities to meet stretch targets, they were met two times for a stretch target success rate of 13%. Of the four metric targets for Goal 4, one met its target every year: **Number of classrooms upgraded with technology**. The targets for **number of online/hybrid degree programs** was met three of four years. Targets for **student satisfaction with support services** and **expenditures on facilities** were met only the first year of the Winthrop Plan. Stretch targets were met for **number of classrooms upgraded with technology** and **number of online/hybrid degree programs** in one of four years.

Table 4 - Performance Summary for Goal Four: Provide facilities, technology, and programs that support Winthrop students and the overall Winthrop experience.			Fall 2017	Fall 2018	Fall 2019	Fall 2020
Number of classrooms with upgraded technology			✔ 28	● 39	● 38	● 38
Number of online/hybrid programs			● 4	✔ 7	● 8	✘ 8
			2016-17	2017-18	2018-19	2019-20
Student satisfaction with support services			● 80%	✘ 80%	✘ 78%	✘ 80%
Expenditures on facilities (maintenance and upgrading)			● \$ 13,500,000	✘\$12,700,000	✘\$ 11,200,000	✘\$ 9,700,000
Stretch Target met ✔	Target met ●	Neither target met ✘				

Going forward, important takeaways were observed in the employee survey results regarding Goal 4 of the WU Plan Strategic Plan. This was the only Goal where all metrics' 2025 targets and stretch targets were rated as "about right". Interestingly, 2025 targets were seen as "about right" for **expenditures on facilities** despite expenditures moving further from those targets every year. Open-ended comments reveal **expenditures on facilities** is an area of much concern with some respondents using adjectives such as "toxic," "deteriorating," "sad," and "poor" to describe some facilities. In light of these comments, the support for keeping the ambitious long-term targets for expenditures seems reasonable. Goal 4 metrics were all forecast to move in the desired direction, with **number of online/hybrid degree programs** and **student satisfaction with support services** expected to meet the 2025 targets. Full survey results and forecasts are presented in Appendix 3, Tables 12, 23 – 37 and 59.



**Goal 3: Attract and retain high quality and diverse faculty, staff and administrators.**

Table 5 presents the progress toward each of the three metric targets for Goal 3 in decreasing order of success. Of the 12 opportunities to meet Goal 3 metric targets, they were met six times, for a success rate of 50%.

Additionally, of the 12 opportunities to meet stretch targets, they were met five times for a stretch target success rate of 42%. Of the three metric targets for Goal 3, one met its target and stretch target every year: **percentage of faculty/managerial staff who are diverse**. The other two metric targets were met only the first or second year of the Winthrop Plan: **Percentage of full-time employees with salaries at or above the median** and **satisfaction of faculty, staff, and administrators** based on one or more rating systems. The stretch target for **satisfaction of faculty, staff and administrators** was also met in the second year of the Winthrop plan. **Satisfaction of faculty, staff and administrators** was placed below **percentage of full-time employees with salaries at or above median** due to the lack of available data to gauge progress.

Table 5 - Performance Summary for Goal Three: Attract and retain high quality and diverse faculty, staff, and administrators.		Fall 2017	Fall 2018	Fall 2019	Fall 2020
Percentage of FT faculty/managerial staff who are AALANA/International		✔18%	✔21%	✔21%	✔23%
% of all full-time employees with salaries at or above the median		●35%	✘29%	✘29%	✘20%
Satisfaction of faculty, staff, and administrators based on one or more rating systems		N/A	✔ 61%	N/A	N/A
Stretch Target met ✔	Target met ●	Neither target met ✘			

Going forward, important takeaways were observed in the employee survey results regarding Goal 3 of the WU Plan Strategic Plan. Goal 3 metrics had the highest percentage of respondents rate them, indicating great interest in these metrics. Additionally, Goal 3 metrics were mentioned most often in the open-ended question addressing what aspect(s) of the WU plan needed improvement. It should also be noted that there are only three metrics for this goal with only two available every year. Unlike the change in the NSSE schedule which affected the availability of three metrics in Goal 2, the change in schedule for assessing **satisfaction of faculty, staff and administrators** appears to be unplanned. If this metric is to be kept, a regular schedule of collection should be observed.

The Goal 3 targets and stretch targets were all rated as “too low” – the only goal for which this was true. Additionally, several open-ended comments express disappointment that the plan set such low 2025 targets for employee satisfaction (60% target) and salary (50% at or above median target). In the words of many respondents, employee satisfaction is foundational to the success of WU plan metrics: “I would like to see a goal of improving morale among faculty, staff, students, and administrators at Winthrop..... This is fundamental to the success of all other current goals within the Winthrop Plan.”

Forecasts for Goal 3 metrics were mixed, without enough data to forecast **satisfaction of faculty, staff and administrators. Percentage of full-time employees with salaries at or above the median** was only 20% most recently and is predicted to decrease to near 0% by 2025. The 2025 targets and stretch targets for **percentage of faculty/managerial staff who are diverse** have already been met and are forecast to be 30% in 2025. Full survey results and forecasts are presented in Appendix 3, Tables 12 – 16 and 59.

Finally, a close read of Goal 3 reveals that quality employees is part of the goal yet none of the metrics relate to quality. It may be reasonable to add a metric measuring quality, such as the percent of faculty with terminal degrees which forms 3% of the score US News and World Report uses to rank the institution. This metric has been improving in recent years.

**Goal 1: Support inclusive excellence by expanding our impact on students and our communities through enrollment growth and increases in retention and graduation rates.**

Table 6 presents the progress toward each of the five metric targets for Goal 1 in decreasing order of success. Of the 20 opportunities to meet Goal 1 metric targets, they were met eight times, for a success rate of 40%. Additionally, of the 20 opportunities to meet stretch targets, they were met three times for a stretch target success rate of 15%. Targets were met three of four years for two Goal 1 metrics: Six-year **graduation rate** and **percent of students who are diverse**. The stretch target was met two of four years for six-year graduation rate but once for percent of students who are diverse. One metric target was successfully met two of four years: undergraduate student **placement rate**. Neither target for total headcount **enrollment** nor one-year **retention rate** were ever met.

<b>Table 6 - Performance Summary for Goal One: Support inclusive excellence by expanding our impact on students &amp; our communities through enrollment growth &amp; increases in retention &amp; graduation rates.</b>				<b>Fall 2017</b>	<b>Fall 2018</b>	<b>Fall 2019</b>	<b>Fall 2020</b>
Six-year Graduation Rate - FT/FT Freshmen				● 57.1%	✗ 56.3%	● 63.7%	● 60.7%
% of all students who are AALANA or International				● 39.7%	✗ 40.4%	● 41%	● 45%
Undergraduate Student Placement Rate				✗ 89.5%	● 91.1%	✗ 87.3%	● 91%
Total headcount enrollment				✗ 6073	✗ 5813	✗ 5865	✗ 5576
One-year Retention Rate - First-Time Full-Time (FT/FT) Freshmen				✗ 76.6%	✗ 74.7%	✗ 70%	✗ 70%
Stretch Target met ●	Target met ●	Neither target met ●					

Going forward, important takeaways were observed in the employee survey results regarding Goal 1 of the WU Plan Strategic Plan. The 2025 targets for Goal 1 metrics were all seen as “about right,” however the 2025 stretch target of 7,500 for **enrollment** was seen as “too high.” When examining enrollment over the past few years, undergraduate enrollment is decreasing while graduate enrollment has been increasing. There may be some

consideration for creating specific goals for particular populations, such as undergraduates and graduates. Finally, open-ended comments regarded the success for the metric **percent of students who are diverse** is a point of pride for the institution.

Forecasts were mixed for Goal 1 metrics with all predicted to move in the desired direction, except **enrollment** and **placement rate**. Six-year **graduation rate** and **percent of students who are diverse** are predicted to meet 2025 stretch targets. Full survey results and forecasts are presented in Appendix 3, Tables 12, 17 – 22 and 59.

## Conclusions

The value of any strategic plan is that it provides a sense of direction for the institution. The Winthrop Plan accomplished that in that for the past five years data has been collected to document progress in generally achieving the strategic goals and their twenty-two associated metrics. The criteria in noting success below is simply whether or not a target was met under each goal. The data does not reveal which specific metric demonstrated success over the time period assessed. As would be expected and can be seen immediately below there was considerable variation in meeting the specific target metrics among the various goals.

- 65% of Goal 5 metric targets were met
- 64% of Goal 4 metric targets were met
- 56% of Goal 2 metric targets were met
- 50% of Goal 3 metric targets were met
- 40% of Goal 1 metric targets were met

While there is variability in meeting the specific targets under each goal one should be careful in drawing comparative conclusions as there is considerable variation in the kind of data employed and in the time frame the data was collected in measuring success under each goal. Also, as noted the criteria for success above was simply whether or not a yearly goal was or was not achieved.

Using a more stringent criteria for success for any specific metric under each goal might be more informative in concluding which specific metrics achieved their targets for the majority of the time period assessed (five or four years). Recognizing that there is variability in the number of years (four or five years) assessed, the following goal targets may be **determined to have been met (3/4 years or 4/5 years)**

- Scholarships provided by the Winthrop University Foundation (Goal 5)
- Debt ratio (Goal 5)
- Total endowment assets (Goal 5)
- Number of classrooms with upgraded technology (Goal 4)
- Number of hybrid/online programs (Goal 4)

- Percent of faculty/staff/managers who are ALANA/International (Goal 3)
- Number of new/redesigned programs (Goal 2)
- Six-year graduation rate (Goal 1)

Using the same criteria as noted above, the following goal targets may be **determined to have not been met**:

- Alumni giving rate (Goal 5)
- Student satisfaction with support services (Goal 4)
- Expenditures on facilities (maintenance and upgrading) (Goal 4)
- Percentage of all full-time employees with salaries at or above the median (Goal 3)
- Enrollment (Goal 1)
- One-year retention rate (Goal 1)

While the above analysis of the metric data over the five-year period of this review is revealing as one considers the relative success the institution achieved in meeting its aspirations, the survey results are also informative. Respondents were also asked for feedback in the form of open-ended responses to questions regarding each Goal, as well as what they believed to be working well and what they felt needed to be improved. Qualitative analysis was performed to identify common topics and themes.

- The most commonly mentioned aspects of the Winthrop Plan that were working well were the Goal 1 metric **percentage of students who are diverse** and the Goal 3 metric **percentage of faculty/managerial staff who are diverse**. This is a clear point of pride among Winthrop employees.
- The most commonly mentioned aspects of the Winthrop Plan that needed improvement were the Goal 3 metrics **percentage of full-time employees with salaries at or above the median** and **employee satisfaction**. Comments for these metrics expressed disappointing progress toward targets that are also perceived as too low.

Additionally, based on metric performance in the past several years, forecasts are provided for 2021 – 2025 in order to assist discussion of future targets and stretch targets. All metrics are forecast to move in the desired direction except **headcount, placement rate, HIP participation, NSSE diversity indicator, percent of full-time salary at or above median** and **alumni giving rate**. Unfortunately, there is not enough data available to predict **employee satisfaction**.

A frequent theme identified within the open-ended comments was whether targets can be met without added resources. There is a sense that the institution is not prioritizing the metrics when sufficient resources are not provided: “I feel like it was put into place to check a box and not to make a real difference. There weren’t enough

resources dedicated to change to make a real difference.” Indeed, in the case of employee satisfaction, it’s not clear whether resources to collect data was provided much less to address employee satisfaction. A possible approach during challenging financial times would be for a specified time to prioritize a metric or two within a goal with additional support and resources. Such prioritized metrics would have targets that are expected to move in a desired direction while other metrics within the goal would have targets that are to be maintained. For example, **enrollment** within Goal 1 could be selected for prioritization with targets set to achieve a certain growth rate while targets for **percent of students who are diverse** are set to be maintained. In Goal 3, **number of online/hybrid programs** could be prioritized while maintaining the current **satisfaction with support services**. The results of the survey could be used to assist in the determination of which metrics have greatest support to prioritize first.

Finally it should be recognized that this review of the Winthrop Plan serves to summarize how the institution responded in achieving its stated goals and aspirations as revealed in its metrics over a five-year period. While the metric analysis and qualitative information provided by the survey paint a point-in-time picture of what the Winthrop Plan has achieved, it should be recognized that with the transition in the university president, the Winthrop Plan and its associated metrics may be changed, expanded or eliminated as appropriate as Dr. Serna crafts his vision and goals for the strategic plan that will characterize his tenure at Winthrop University.

## Appendix 1 - Winthrop Plan Metric Definitions

### Goal 1 Metrics Definitions

- a) Total Headcount Enrollment – Official Fall Census Headcount.
- b) One-year retention rate – First-Time/Full-Time Freshmen – Percentage of entering fall cohort who returned subsequent fall.
- c) Six-year graduation rate – First-Time/Full-Time Freshmen – Percentage of entering fall cohort who graduated with a bachelor’s degree from Winthrop within 6 years.
- d) Post-graduation placement rate of undergraduates into employment, advanced education and/or military service – Weighted percentage employed, pursuing advanced education and/or in the military from the most recent Alumni Survey (administered Summer of even years) and percentage who are *or plan to be* following graduation employed, pursuing advanced education and/or in the military from the most recent Graduating Senior Survey (GSS) (administered fall and spring terms, data combined for analyses). The Alumni Survey is weighted .85 and GSS is weighted .15.
- e) Percentage of students who are diverse – Official Fall Census Headcount. Diversity according to WINTHROP Plan is all students who do not belong to the racial/ethnic group of White or Unknown.

### Goal 2 Metric Definitions:

- a) Percentage of undergraduate students who graduate with at least two high-impact practices (research, internship, etc.) - This metric is defined as the percentage of Winthrop Senior NSSE respondents who reported participation in 2 or more high-impact practices (learning community; service-learning; work with a faculty member on research; study abroad; culminating senior experience; internship or field experience) in the most recent NSSE Survey results. NSSE is administered Spring term of even years to Freshmen and Seniors.
- b) National Survey of Student Engagement (NSSE) Diversity Indicator - The NSSE Student-Faculty Interaction Indicator metric is defined as the average percentage of Winthrop Senior NSSE respondents who answered “often” or “very often” to the 4 questions below in the most recent NSSE Survey results:  
  
“During the current school year, about how often have you done the following?”
  - Talked about career plans with a faculty member
  - Worked with a faculty member on activities other than coursework (committees, student groups, etc.)
  - Discussed course topics, ideas, or concepts with a faculty member outside of class
  - Discussed your academic performance with a faculty member.”

NSSE is administered Spring term of even years to Freshmen and Seniors.

- c) **NSSE Student-Faculty Interaction** Engagement Indicator - The **NSSE Diversity Indicator** metric is defined as the average percentage of Winthrop Senior NSSE respondents who answered “often” or “very often” to the 4 questions below in the most recent NSSE Survey results:

“During the current school year, about how often have you had discussions with people from the following groups?

- People of a race or ethnicity other than your own
- People from an economic background other than your own
- People with religious beliefs other than your own
- People with political views other than your own.”

NSSE is administered Spring term of even years to Freshmen and Seniors.

- d) Number of new and redesigned programs - A cumulative count beginning with AY2015-16 of programs that have received full approval of faculty governance and all necessary governing bodies.

### **Goal 3 Metric Definitions:**

- a) Percentage of faculty/managerial staff who are diverse – Official Fall Census Headcount. Using IPEDS definitions, percentage of full-time instructional staff (faculty) and full-time non-instructional staff who have occupational code starting with 11 (management occupations) who are diverse. Diversity according to WINTHROP Plan is all students who do not belong to the racial/ethnic group of White or Unknown.
- b) Percentage of full-time employees with salaries at or above the median - Based on most recent CUPA-HR's salary medians, job codes and CIP codes as reported by HR, and regional comparison groups.
- c) Satisfaction of faculty, staff, and administrators based on one or more rating systems.

### **Goal 4 Metric Definitions:**

- a) Number of classrooms upgraded with technology - Classrooms or instructional labs with upgraded equipment (i.e., All-In-One touch screens, projectors, WiFi, collaboration tools, etc.) provided that fiscal year, ready in time for the following fall semester.
- b) Student satisfaction with support services – Percentage of GSS respondents who answered “very satisfied” or “satisfied” with following question on most recent GSS administration:

“Please rate your level of satisfaction with your overall educational support services.”

Twenty-one educational support areas such as Financial Aid Office, Academic Computing Centers and Counseling Services are listed previous to the question.

c) Number of online/hybrid degree programs – A cumulative count, starting in AY201516. Number of CHE and SACSCOC approved degree programs either fully online or hybrid (50% or more online).

d) Expenditures on facilities - Expenses related to maintaining and improving facilities, as reported most recently by Finance and Business to IPEDS Part C2 Line 4.

**Goal 5 Metric Definitions:**

- a) Total endowment assets - Gross investments of endowments for Winthrop and the Winthrop Foundation, as reported most recently by Finance and Business to IPEDS Part A Line 17.
- b) Unrestricted gift revenues - Unrestricted gifts and investment returns earned from general, unspecified donations to the University during the calendar year. The Foundation, through its fundraising efforts, receives gifts from donors that are made without restriction. These gifts are used at the discretion of the Foundation Board and are given back to the University in the form of unrestricted scholarship and other University support.
- c) Alumni giving rates - Number of alumni donors in fiscal year divided by number of undergraduate alumni of record at institution as reported US News.
- d) Scholarship/grant dollars provided to students from University & Foundation - Scholarship funds (in millions) disbursed to students from the University and the Foundation in FY, as reported by Financial Aid Office.
- e) Institutional debt ratio - Debt to asset ratio is calculated by dividing debt by assets (current and capital).



**Appendix 2 – Table 1: Complete Winthrop Plan Metrics, Targets and Stretch Targets**

	Fail 2017	Fail 2017 Target	Fail 2017 Stretch Target	Fail 2018	Fail 2018 Target	Fail 2018 Stretch Target	Fail 2019	Fail 2019 Target	Fail 2019 Stretch Target	Fail 2020	Fail 2020 Target	Fail 2020 Stretch Target	Fail 2025	Fail 2025 Target	Fail 2025 Stretch Target	
Enrollment	✖ 6073	6120	6200	✖ 5813	6150	6200	✖ 5865	6000	6100	✖ 5576	6000	6100	7000	7500		
% of all students who are AA/LANA or International	39.7%	40%	41%	✖ 40.4%	41%	42%	41%	41%	42%	✔ 45%	43%	44%	43%	45%		
One-year Retention Rate - First-Time Full-Time (F/T) Freshmen	✔ 76.6%	78%	80%	✖ 74.7%	78%	80%	70%	78%	80%	✖ 70%	75%	77%	82%	85%		
Six-year Graduation Rate - F/T Freshmen	57.1%	56%	59%	✖ 56.3%	58%	59%	✔ 63.7%	61%	63%	✔ 60.7%	60%	61%	61%	65%		
Undergraduate Student Placement Rate	✖ 89.5%	90.5%	92%	91.1%	90.5%	92%	✖ 87.3%	90%	92%	✔ 91%	91%	93%	92%	95%		
Goal Two: Continually enhance the quality of the Winthrop experience for all students by promoting a culture of innovation, with an emphasis on global and community engagement.	2016 NSSE - WU Seniors	2016 NSSE - Target	2016 NSSE - Stretch Target	2018 NSSE avg. WU Seniors	2018 NSSE - Target	2018 NSSE - Stretch Target	2018 NSSE - Stretch Target					2021 NSSE WU Seniors	2021 NSSE - Target	2021 NSSE - Stretch Target	2024 NSSE - Target	2024 NSSE - Stretch Target
% of undergraduate students who graduate with at least two high impact practices (NSSE)	✔ 70%	79%	80%	✔ 70%	69%	79%	80%					73%	79%	84%	89%	
NSSE Diversity Indicator	✔ 79%	78%	80%	✖ 70%	78%	80%	82%					81%	85%	83%	88%	
NSSE Student-Faculty Interaction Indicator	✔ 49%	45%	47%	✖ 34%	46%	50%	52%					49%	52%	52%	55%	
	2016-17	Fail 2017 Target	Fail 2017 Stretch Target	2017-18	Fail 2018 Target	Fail 2018 Stretch Target	2018-19	Fail 2019 Target	Fail 2019 Stretch Target	2019-20	Fail 2020 Target	Fail 2020 Stretch Target	2020-21	Fail 2021 Target	Fail 2021 Stretch Target	
Number of new and substantially redesigned programs developed in support of institutional goals	✔ 3	2	TBD	✔ 8	5	7	✔ 9	7	9	✔ 9	9	TBD	✔ 11	11	TBD	
Goal Three: Attract and retain high quality and diverse faculty, staff, and administrators.	Fail 2017	Fail 2017 Target	Fail 2017 Stretch Target	Fail 2018	Fail 2018 Target	Fail 2018 Stretch Target	Fail 2019	Fail 2019 Target	Fail 2019 Stretch Target	Fail 2020	Fail 2020 Target	Fail 2020 Stretch Target	Fail 2025	Fail 2025 Target	Fail 2025 Stretch Target	
Percentage of FT faculty/managerial staff who are AA/LANA/International	✔ 18%	15%	15.5%	✔ 21%	17%	18%	✔ 21%	18%	19%	✔ 23%	19%	20%	18.5%	20%		
% of all full-time employees with salaries at or above the median	35%	35%	40%	✖ 29%	39%	41%	✖ 29%	36%	40%	✖ 20%	36%	40%	50%	55%		
Satisfaction of faculty, staff, and administrators based on one or more rating systems	N/A	N/A	N/A	✔ 61%	53%	55%	N/A	N/A	N/A	N/A	N/A	N/A	60%	65%		
Goal Four: Provide facilities, technology, and programs that support Winthrop students and the overall Winthrop experience.	Fail 2017	Fail 2017 Target	Fail 2017 Stretch Target	Fail 2018	Fail 2018 Target	Fail 2018 Stretch Target	Fail 2019	Fail 2019 Target	Fail 2019 Stretch Target	Fail 2020	Fail 2020 Target	Fail 2020 Stretch Target	Fail 2025	Fail 2025 Target	Fail 2025 Stretch Target	
Number of classrooms with upgraded technology	✔ 28	5	6	✔ 39	38	43	✔ 38	38	43	✔ 38	39	43	60	62		
Number of online/hybrid programs	✔ 4	3	5	✔ 7	5	7	✔ 8	8	9	✖ 8	9	11	15	20		
2016-17	Fail 2017 Target	Fail 2017 Stretch Target	2017-18	Fail 2018 Target	Fail 2018 Stretch Target	2018-19	Fail 2019 Target	Fail 2019 Stretch Target	2019-20	Fail 2020 Target	Fail 2020 Stretch Target	2020-21	Fail 2025	Fail 2025 Target		
Student satisfaction with support services	✔ 80%	80%	85%	✖ 80%	82%	85%	✖ 78%	82%	85%	✖ 80%	82%	85%	95%	85%		
2016-17 / FY17	Fail 2017 Target	Fail 2017 Stretch Target	2017-18 / FY18	Fail 2018 Target	Fail 2018 Stretch Target	2018-19 / FY19	Fail 2019 Target	Fail 2019 Stretch Target	2019-20 / FY20	FY20 Target	FY20 Stretch Target	2020-21 / FY21	FY25 Target	FY25 Stretch Target		
Expenditures on facilities (maintenance and upgrading)	✔ 13,500,000	\$ 13,500,000	\$ 13,750,000	✖ \$12,700,000	\$ 13,750,000	\$ 14,000,000	✖ \$ 11,200,000	\$ 13,750,000	\$ 14,000,000	✖ \$ 9,700,000	\$ 13,750,000	\$ 14,000,000		\$ 15,000,000	\$ 22,000,000	
Goal Five: Ensure financial stability and sustainability.	2016-17 / FY17	Fail 2017 Target	Fail 2017 Stretch Target	2017-18 / FY18	Fail 2018 Target	Fail 2018 Stretch Target	2018-19 / FY19	Fail 2019 Target	Fail 2019 Stretch Target	2019-20 / FY20	Fail 2020 Target	Fail 2020 Stretch Target	2020-21 / FY21	Fail 2025 Target	Fail 2025 Stretch Target	
Total Endowment Assets	✔ \$51,400,000	\$45,000,000	\$47,500,000	✖ \$55,600,000	\$52,000,000	\$55,000,000	\$59,000,000	\$58,000,000	\$60,000,000	✖ \$58,900,000	\$62,000,000	\$65,000,000	\$60,000,000	\$80,000,000	\$90,000,000	
Unrestricted Gift Revenues	✔ \$567,786	\$500,000	\$600,000	✖ \$270,47	\$500,000	\$600,000	✔ \$714,437	\$500,000	\$60,000	✖ \$587,316	\$500,000	\$600,000		\$700,000	\$1,000,000	
Alumni Giving Rate	✔ 7.0%	9.5%	10%	✖ 3.2%	8%	8.5%	✔ 5.1%	7%	8%	✖ 4.4%	7%	8%		13%	15.0%	
Scholarship/grant dollars provided to students from U and Foundation	✔ \$20,000,000	\$16,800,000	\$17,000,000	✖ \$21,000,000	\$20,000,000	\$20,500,000	✔ \$21,000,000	\$21,000,000	\$22,000,000	✖ \$20,800,000	\$21,000,000	\$22,000,000		\$20,000,000	\$22,000,000	
Debt Ratio	✔ 0.48	0.5	0.515	✔ 0.45	0.48	0.47	✔ 0.41	0.44	0.43	✔ 0.37	0.38	0.36		0.4	0.35	

KEY:

Stretch Target met

Target met

Target not met

## Appendix 3 – Winthrop Plan Survey of Employees Methodology and Results

### Assessing Faculty & Staff Opinions Regarding Winthrop University Strategic Plan

Five years after the launch of the Winthrop Plan, campus leadership administered a survey to assess faculty and staff opinions regarding the Winthrop Plan goals, progress metrics and targets, and the planning process itself. Of the 1,284 employees surveyed, 304 responded for a response rate of 24%. Table 7 shows the percentage of respondents by self-identified institutional role.

<b>Table 7 - Respondents by Role</b>		
What is your primary role at Winthrop University?		
Role	Frequency (within row)	Count
Administrator	6%	19
Faculty	39%	119
Staff	47%	144
Other/Prefer not to answer	7%	22
<b>Overall</b>	<b>100%</b>	<b>304</b>

Additionally, 8% of respondents had served either on a Working Group, helping to formulate the Winthrop Plan, or on an Action Group, helping to implement the Winthrop Plan. The demographics of respondents by role and participation in these groups appear in Table 8.

<b>Table 8 - Respondents by Role and Working and / or Action Group Participation</b>									
Question	Role	Yes		No		Not sure / Prefer Not to Answer		Overall	
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count
Several Working Groups were created to develop the Winthrop Plan. Did you serve on a Working Group?	Administrator	21%	4	79%	15	0%	0	100%	19
	Faculty	9%	11	85%	100	5%	6	100%	117
	Staff	6%	9	92%	130	2%	3	100%	142
	Other/Prefer not to answer	5%	1	86%	19	9%	2	100%	22
<b>Overall</b>		<b>8%</b>	<b>25</b>	<b>88%</b>	<b>264</b>	<b>4%</b>	<b>11</b>	<b>100%</b>	<b>300</b>
After the Winthrop Plan launched, several Action Groups were formed to advance the Plan's initiatives. Do you currently	Administrator	37%	7	63%	12	0%	0	100%	19
	Faculty	7%	8	87%	100	6%	7	100%	115
	Staff	6%	8	89%	126	5%	7	100%	141
	Other/Prefer not to answer	9%	2	77%	17	14%	3	100%	22
<b>Overall</b>		<b>8%</b>	<b>25</b>	<b>86%</b>	<b>255</b>	<b>6%</b>	<b>17</b>	<b>100%</b>	<b>297</b>

### *Familiarity with Winthrop Plan*

All but one respondent rated their familiarity with the Winthrop Plan. A majority of respondents, 70%, were at least “moderately familiar.” Table 9 shows the ratings of familiarity by role and overall. Familiarity was rated on a five-point scale with five being “extremely familiar,” four being “very familiar,” three being “moderately familiar,”

two being “slightly familiar,” and one being “not familiar at all.” Based on the scale values, means above 4.50 are considered to be “extremely familiar,” means between 4.49 and 3.50 are considered to be “very familiar,” means between 3.49 and 2.50 are considered to be “moderately familiar,” means between 2.49 and 1.50 are considered to be “slightly familiar” and means less than 1.50 are considered to be “not familiar at all.” The mean overall familiarity with the plan was 3.01, “moderately familiar,” with all groups means also in the “moderately familiar” range except Administrators who had a group mean familiarity of 4.00, “very familiar.”

<b>Table 9 - Winthrop Plan Familiarity by Role</b>													
In 2016, Winthrop University launched the Winthrop Plan, a strategic plan for the institution. How familiar are you with that plan?													
Role	Extremely familiar (5)		Very familiar (4)		Moderately familiar (3)		Slightly familiar (2)		Not familiar at all (1)		Overall		Mean
	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Administrator	32%	6	37%	7	32%	6	0%	0	0%	0	100%	19	4.00
Faculty	6%	7	25%	30	45%	54	18%	21	6%	7	100%	119	3.08
Staff	3%	5	27%	38	36%	51	24%	35	10%	14	100%	143	2.90
Other/Prefer not to answer	5%	1	18%	4	23%	5	32%	7	23%	5	100%	22	2.50
<b>Overall</b>	<b>6%</b>	<b>19</b>	<b>26%</b>	<b>79</b>	<b>38%</b>	<b>116</b>	<b>21%</b>	<b>63</b>	<b>9%</b>	<b>26</b>	<b>100%</b>	<b>303</b>	<b>3.01</b>

Similar to Administrators, those who served on a Working Group also had mean familiarity in the “very familiar” range. As shown in Table 10, while the overall familiarity was 3.02, “moderately familiar,” those who participated in a Working Group had a mean familiarity of 4.04, “very familiar.”

<b>Table 10: Winthrop Plan Familiarity by Working Group Participation</b>													
In 2016, Winthrop University launched the Winthrop Plan, a strategic plan for the institution. How familiar are you with that plan?													
Working Group	Extremely familiar (5)		Very familiar (4)		Moderately familiar (3)		Slightly familiar (2)		Not familiar at all (1)		Overall		Mean
	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Served on Working Group	28%	7	56%	14	12%	3	0%	0	4%	1	100%	25	4.04
Did not serve on Working Group	5%	12	24%	62	40%	106	22%	59	9%	24	100%	263	2.92
Not sure / Prefer not to answer	0%	0	27%	3	64%	7	9%	1	0%	0	100%	11	3.18
<b>Overall</b>	<b>6%</b>	<b>19</b>	<b>26%</b>	<b>79</b>	<b>39%</b>	<b>116</b>	<b>20%</b>	<b>60</b>	<b>8%</b>	<b>25</b>	<b>100%</b>	<b>299</b>	<b>3.02</b>

Similarly, those who served on an Action Group had a mean familiarity in the “very familiar” range. As shown in Table 11, while the overall familiarity was 3.02, “moderately familiar,” those who participated in an Action Group had a mean familiarity of 3.92, “very familiar.”

<b>Table 11: Winthrop Plan Familiarity by Action Group Participation</b>													
In 2016, Winthrop University launched the Winthrop Plan, a strategic plan for the institution. How familiar are you with that plan?													
Action Group	Extremely familiar (5)		Very familiar (4)		Moderately familiar (3)		Slightly familiar (2)		Not familiar at all (1)		Overall		Mean
	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Served on Action Group	24%	6	48%	12	24%	6	4%	1	0%	0	100%	25	3.92
Did not serve on Action Group	5%	12	24%	61	39%	100	22%	56	10%	25	100%	254	2.92
Not sure / Prefer not to answer	6%	1	29%	5	53%	9	12%	2	0%	0	100%	17	3.29
<b>Overall</b>	<b>6%</b>	<b>19</b>	<b>26%</b>	<b>78</b>	<b>39%</b>	<b>115</b>	<b>20%</b>	<b>59</b>	<b>8%</b>	<b>25</b>	<b>100%</b>	<b>296</b>	<b>3.02</b>

### ***Involvement with Advancing each Winthrop Plan Goal***

Respondents were asked to rate their involvement in advancing each of the Winthrop Plan Goals. About 85% of the 304 respondents rated their involvement in advancing Winthrop Plan Goals. Table 12 shows the ratings of involvement in advancing each Goal overall and by role, presented in descending order of overall involvement. Goal 1 is presented first, as it had the highest overall involvement with 65% reporting being at least “somewhat involved” in advancing the metrics of Goal 1. Goal 2 had the second highest level of overall involvement with 55% reporting being at least “somewhat involved” in advancing the Goal 2.

Winthrop Plan Goals 3, 4, and 5, each had more respondents reporting being uninvolved with advancing them than involved. Goal 4 had 45% of respondents reporting being at least “somewhat involved” while a higher percentage, 47%, were either “somewhat uninvolved” or “very uninvolved.” Of those who rated their involvement level in advancing Goal 3, 39% of respondents reporting being at least “somewhat involved,” while a higher percentage, 54%, were either “somewhat uninvolved” or “very uninvolved.” Finally, the lowest overall involvement among respondents who gave ratings was for Goal 5 with 29% being at least “somewhat involved,” while a higher percentage, 60%, were either “somewhat uninvolved” or “very uninvolved.”

Involvement was measured on a four-point scale, with four being “very involved,” three being “somewhat involved,” two being “somewhat uninvolved,” and one being “very uninvolved.” Based on the scale values, means above 3.50 are considered to be “very involved,” means between 3.49 and 2.50 are considered to be “somewhat involved,” means between 2.49 and 1.50 are considered to be “somewhat uninvolved,” and means less than 1.50 are considered to be “very uninvolved.” Overall means for Goal 1 and Goal 2, 2.87 and 2.75 respectively, indicate respondents were “somewhat involved.” Like the overall mean for Goal 1 involvement, all group means also indicated “somewhat involved.” However, for Goal 2, all group means indicated “somewhat involved” like the overall mean, with the exception of Staff, who had a group mean of 2.34, “somewhat uninvolved.”

Overall mean involvement for the remaining Goals indicated “somewhat uninvolved.” The mean overall involvement with advancing Goal 4 was 2.36, with all group means also within the “somewhat uninvolved” range, with the exception of Administrators who had mean involvement of 2.63, “somewhat involved.” The mean overall involvement with advancing Goal 3 was 2.21, with Staff and those who did not report their role also within the “somewhat uninvolved” range, however, Goal 3 involvement group means for Administrators and Faculty were 3.06 and 2.53 respectively, both within the range of “somewhat involved.” Finally, the mean overall involvement with advancing Goal 5 was 1.95 with all groups also within the “somewhat uninvolved” range, with the exception of Administrators, whose mean involvement was 2.74, “somewhat involved.”

<b>Table 12 -Involvement in Winthrop Plan Goal Advancement by Role</b>														
Through your work responsibilities, how involved are you in the advancing one or more aspects of each of the Winthrop Plan goals described below?														
	Role	Very involved (4)		Somewhat involved (3)		Somewhat uninvolved (2)		Very uninvolved (1)		Don't know*		Overall		Mean*
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Goal 1: Support inclusive excellence by expanding our impact on students and our communities through enrollment growth and increases in retention and graduation rates.	Administrator	44%	8	28%	5	11%	2	17%	3	0%	0	100%	18	3.00
	Faculty	45%	46	36%	37	10%	10	3%	3	7%	7	100%	103	3.31
	Staff	23%	28	31%	37	17%	21	26%	31	3%	4	100%	121	2.53
	Other/Prefer not to answer	27%	4	20%	3	20%	3	27%	4	7%	1	100%	15	2.50
	<b>Overall</b>	<b>33%</b>	<b>86</b>	<b>32%</b>	<b>82</b>	<b>14%</b>	<b>36</b>	<b>16%</b>	<b>41</b>	<b>5%</b>	<b>12</b>	<b>100%</b>	<b>257</b>	<b>2.87</b>
Goal 2: Continually enhance the quality of the Winthrop experience for all students by promoting a culture of innovation with an emphasis on global and community	Administrator	61%	11	11%	2	6%	1	22%	4	0%	0	100%	18	3.11
	Faculty	41%	42	35%	36	12%	12	6%	6	6%	6	100%	102	3.19
	Staff	15%	18	28%	34	27%	33	26%	31	4%	5	100%	121	2.34
	Other/Prefer not to answer	40%	6	13%	2	7%	1	33%	5	7%	1	100%	15	2.64
	<b>Overall</b>	<b>30%</b>	<b>77</b>	<b>25%</b>	<b>74</b>	<b>20%</b>	<b>47</b>	<b>20%</b>	<b>46</b>	<b>5%</b>	<b>12</b>	<b>100%</b>	<b>256</b>	<b>2.75</b>
Goal 4: Provide facilities, technology, and programs that support Winthrop students and the overall Winthrop experience.	Administrator	32%	6	32%	6	5%	1	32%	6	0%	0	100%	19	2.63
	Faculty	17%	17	26%	27	21%	21	25%	26	11%	11	100%	102	2.38
	Staff	22%	27	21%	26	13%	16	36%	44	7%	8	100%	121	2.32
	Other/Prefer not to answer	13%	2	33%	5	7%	1	40%	6	7%	1	100%	15	2.21
	<b>Overall</b>	<b>20%</b>	<b>52</b>	<b>25%</b>	<b>64</b>	<b>15%</b>	<b>39</b>	<b>32%</b>	<b>82</b>	<b>8%</b>	<b>20</b>	<b>100%</b>	<b>257</b>	<b>2.36</b>
Goal 3: Attract and retain high quality and diverse faculty, staff and administrators.	Administrator	44%	8	33%	6	6%	1	17%	3	0%	0	100%	18	3.06
	Faculty	17%	17	32%	33	24%	24	18%	18	10%	10	100%	102	2.53
	Staff	8%	10	17%	21	21%	25	49%	59	5%	6	100%	121	1.84
	Other/Prefer not to answer	13%	2	27%	4	7%	1	47%	7	7%	1	100%	15	2.07
	<b>Overall</b>	<b>14%</b>	<b>37</b>	<b>25%</b>	<b>64</b>	<b>20%</b>	<b>51</b>	<b>34%</b>	<b>87</b>	<b>7%</b>	<b>17</b>	<b>100%</b>	<b>256</b>	<b>2.21</b>
Goal 5: Ensure financial stability and sustainability.	Administrator	37%	7	21%	4	21%	4	21%	4	0%	0	100%	19	2.74
	Faculty	6%	6	17%	17	14%	14	45%	45	18%	18	100%	100	1.80
	Staff	7%	9	23%	28	17%	21	46%	56	7%	8	100%	122	1.91
	Other/Prefer not to answer	13%	2	13%	2	33%	5	33%	5	7%	1	100%	15	2.07
	<b>Overall</b>	<b>9%</b>	<b>24</b>	<b>20%</b>	<b>51</b>	<b>17%</b>	<b>44</b>	<b>43%</b>	<b>110</b>	<b>11%</b>	<b>27</b>	<b>100%</b>	<b>256</b>	<b>1.95</b>
**Don't know" excluded from calculation of mean														

In summary, considering group means for involvement in advancing each Goal, only Goal 1 had every group involved in advancing it. All groups but Staff are involved in advancing Goal 2. Only Administrators and Faculty are involved in advancing Goal 3. Administrators were “somewhat involved” in advancing every Goal and were the only group involved in advancing Goal 4 and Goal 5.

### ***Winthrop Plan Metrics and Targets***

Survey respondents' opinions regarding the Winthrop Plan metrics and targets will be presented in descending order by percentage of respondents who chose to give feedback for each Goal. Goal 3 is presented first, as the highest percentage of respondents, 36%, provided feedback.

#### **Winthrop Goal 3: Attract and retain high quality and diverse faculty, staff and administrators**

About 36% of the 304 respondents chose to give feedback on the appropriateness of the Winthrop Plan Goal 3 metrics. Of note, this is the highest rate of response among the five Winthrop Plan Goal metrics, indicating greatest interest in providing feedback was for the Goal 3 metrics. Recall, Goal 3 had the 4<sup>th</sup> highest overall involvement, 39% and the 4<sup>th</sup> highest success rate meeting targets, 50%.

#### ***Winthrop Plan Goal 3 Metrics***

Respondents were asked to rate each of the Goal 3 metrics on its appropriateness as a measure of progress. Table 13 presents the respondent ratings overall and by role. Results are presented in descending order, with highest overall ratings of combined "appropriate" and "somewhat appropriate" responses at the top of the table.

**Satisfaction of faculty, staff, and administrators** had the highest rating, with 89% of respondents rating it as at least a "somewhat appropriate" metric. **Percentage of faculty/managerial staff who are diverse** had the second highest rating of appropriateness, as 88% of respondents rated it as at least a "somewhat appropriate" metric.

**Percentage of full-time employees with salaries at or above the median** had the lowest rating of appropriateness as 87% rated it as at least a "somewhat appropriate" metric.

Ratings were given on a four-point scale, with four being "appropriate," three being "somewhat appropriate," two being "somewhat inappropriate," and one being "inappropriate." Based on the scale values, means above 3.50 are considered to be "appropriate," means between 3.49 and 2.50 are considered to be "somewhat appropriate," means between 2.49 and 1.50 are considered to be "somewhat inappropriate," and means less than 1.50 are considered to be "inappropriate." For **satisfaction of faculty, staff, and administrators**, the overall mean rating of appropriateness was 3.54, "appropriate," with all group means also in the "appropriate" range, with the exception of Staff who had a group mean of 3.44, "somewhat appropriate." The overall mean appropriateness for **percentage of faculty/managerial staff who are diverse** was 3.44, "somewhat appropriate" with Faculty and Staff having group means also in the "somewhat appropriate" range. Administrators and those who did not identify their role, however, had group means showing greater support for the appropriateness of this metric, as their group means, 3.73 and 3.80 respectively, were in the "appropriate" range. The overall mean appropriateness for **percentage of full-time employees with salaries at or above the median** was 3.50, "appropriate," with

Administrators and those who did not identify their role having group means showed greater support for this metric, with group means of 3.82, also in the “appropriate” range. Faculty and Staff showed less support for this metric, as their group means, 3.45 and 3.43 respectively, were in the “somewhat appropriate” range.

Table 13 - Goal 3 Metrics Feedback by Role														
If "Yes" to "Would you like to provide feedback on the metrics for Goal 3?": Below are the metrics chosen to measure success for Goal 3. Do you believe each metric is appropriate as one of the indicators of success for Goal 3?														
Metric	Role	Appropriate (4)		Somewhat appropriate (3)		Somewhat inappropriate (2)		Inappropriate (1)		Don't know*		Overall		Mean *
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Satisfaction of faculty, staff, and administrators based on one or more rating systems	Administrator	91%	10	9%	1	0%	0	0%	0	0%	0	100%	11	3.91
	Faculty	70%	31	18%	8	2%	1	9%	4	0%	0	100%	44	3.50
	Staff	69%	33	17%	8	4%	2	10%	5	0%	0	100%	48	3.44
	Other/Prefer not to answer	100%	5	0%	0	0%	0	0%	0	0%	0	100%	5	4.00
	<b>Overall</b>	<b>73%</b>	<b>79</b>	<b>16%</b>	<b>17</b>	<b>3%</b>	<b>3</b>	<b>8%</b>	<b>9</b>	<b>0%</b>	<b>0</b>	<b>100%</b>	<b>108</b>	<b>3.54</b>
Percentage of faculty/managerial staff who are diverse	Administrator	91%	10	0%	0	0%	0	9%	1	0%	0	100%	11	3.73
	Faculty	61%	27	25%	11	5%	2	9%	4	0%	0	100%	44	3.39
	Staff	58%	28	29%	14	6%	3	6%	3	0%	0	100%	48	3.40
	Other/Prefer not to answer	80%	4	20%	1	0%	0	0%	0	0%	0	100%	5	3.80
	<b>Overall</b>	<b>64%</b>	<b>69</b>	<b>24%</b>	<b>26</b>	<b>5%</b>	<b>5</b>	<b>7%</b>	<b>8</b>	<b>0%</b>	<b>0</b>	<b>100%</b>	<b>108</b>	<b>3.44</b>
Percentage of full-time employees with salaries at or above the median	Administrator	82%	9	18%	2	0%	0	0%	0	0%	0	100%	11	3.82
	Faculty	68%	30	18%	8	5%	2	9%	4	0%	0	100%	44	3.45
	Staff	69%	33	15%	7	2%	1	13%	6	2%	1	100%	48	3.43
	Other/Prefer not to answer	80%	4	20%	1	0%	0	0%	0	0%	0	100%	5	3.82
	<b>Overall</b>	<b>70%</b>	<b>76</b>	<b>17%</b>	<b>18</b>	<b>3%</b>	<b>3</b>	<b>9%</b>	<b>10</b>	<b>1%</b>	<b>1</b>	<b>100%</b>	<b>108</b>	<b>3.50</b>
* "Don't know" excluded from calculation of mean														

In summary, considering mean ratings of appropriateness, **satisfaction of faculty, staff, and administrators** and **percentage of full-time employees with salaries at or above the median** were rated overall as “appropriate.” Group means for **satisfaction of faculty, staff, and administrators** aligned with the overall rating for all groups except Staff, who rated it as “somewhat appropriate.” Staff and Faculty did not align with the overall rating for **percentage of full-time employees with salaries at or above the median**, as the groups’ means for this metric were in the “somewhat appropriate” range. **Percentage of faculty/managerial staff who are diverse** was rated as “somewhat appropriate” overall and by all groups, with the exception of Administrators and those who did not provide their role, rating this metric higher, in the “appropriate” range.

### ***Winthrop Plan Goal 3 Metric 2025 Targets***

Of interest, as noted later, targets and stretch targets generally were rated as “about right,” but targets and stretch targets for Goal 3 Metrics are the only ones generally rated as “too low” by the overall majority. Feedback on targets and stretch targets are discussed in descending order, with the targets having the highest percentage of respondents rating targets as “too low” presented first. Ratings used a three-point scale with three being “too high,” two being “about right,” and one being “too low.” Based on the scale values, means above 2.50 are

considered “too high,” means between 2.49 and 1.50 are considered “about right,” and means less than 1.50 are considered “too low.”

The most current (and only) score of **satisfaction of faculty, staff, and administrators** was 61% from 2017. As shown in Table 14, a majority, 83%, rated the **satisfaction of faculty, staff, and administrators** target of 60% as “too low.” The overall mean rating of the target was 1.19, “too low,” with all group means also in the “too low” range, except those who did not provide their role whose group mean, 1.50, indicated “about right.” The **satisfaction of faculty, staff, and administrators** stretch target of 65% was also rated by a majority, 84%, as “too low.” The overall mean rating of the stretch target was 1.18, “too low,” again with all group means also in the “too low” range, except those who did not provide their role whose group mean, 1.50, indicated “about right.” With just four respondents in this group (i.e., other/prefer not to answer), results are interpreted with caution.

Table 14 - Goal 3 Metrics Targets and Stretch Targets Feedback by Role: Satisfaction										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 3?" and "Would you like to provide feedback on the targets and stretch targets for Goal 3?": Below are the most recent values for each metric for Goal 3 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 3 is appropriate?										
Satisfaction of faculty, staff, and administrators based on one or more rating systems, Current = 61%; Target = 60%; Stretch Target = 65%	Administrator	0%	0	20%	2	80%	8	100%	10	1.20
	Faculty	0%	0	6%	2	94%	29	100%	31	1.06
	Staff	3%	1	21%	8	77%	30	100%	39	1.26
	Other/Prefer not to answer	25%	1	0%	0	75%	3	100%	4	1.50
	<b>Overall</b>	<b>2%</b>	<b>2</b>	<b>14%</b>	<b>12</b>	<b>83%</b>	<b>70</b>	<b>100%</b>	<b>84</b>	<b>1.19</b>
	Role	<b>Stretch Target</b>								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	0%	0	13%	1	88%	7	100%	8	1.13
	Faculty	0%	0	13%	4	87%	27	100%	31	1.13
	Staff	0%	0	19%	7	81%	30	100%	37	1.19
	Other/Prefer not to answer	25%	1	0%	0	75%	3	100%	4	1.50
	<b>Overall</b>	<b>1%</b>	<b>1</b>	<b>15%</b>	<b>12</b>	<b>84%</b>	<b>67</b>	<b>100%</b>	<b>80</b>	<b>1.18</b>

The most recent **percentage of full-time employees with salaries at or above the median** was 20% and the target of 50% was rated by a majority, 64%, as “too low,” as indicated in the Table 15. The overall mean rating of the target was 1.41, “too low,” with Faculty and Staff aligning with the overall rating, but Administrators and those who did not provide their role rating the target “about right.” Similarly, the stretch target for **percentage of full-time employees with salaries at or above the median** of 55% was rated by a majority, 64%, as “too low.” The overall mean rating of the stretch target was 1.41, “too low,” again with Faculty and Staff also rating the stretch target as “too low,” but Administrators and those who did not provide their role rating the stretch target “about right.”



**Table 15 - Goal 3 Metrics Targets and Stretch Targets Feedback by Role: Salary**

If "Yes" to both "Would you like to provide feedback on the metrics for Goal 3?" and "Would you like to provide feedback on the targets and stretch targets for Goal 3?": Below are the most recent values for each metric for Goal 3 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 3 is appropriate?

Metric Targets	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Percentage of full-time employees with salaries at or above the median, Current = 20%; Target = 50%; Stretch Target = 55%	Administrator	0%	0	60%	6	40%	4	100%	10	1.60
	Faculty	3%	1	26%	8	71%	22	100%	31	1.32
	Staff	5%	2	30%	12	65%	26	100%	40	1.40
	Other/Prefer not to answer	25%	1	25%	1	50%	2	100%	4	1.75
	Overall	5%	4	32%	27	64%	54	100%	85	1.41
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count		
	Administrator	0%	0	50%	4	50%	4	100%	8	1.50
	Faculty	3%	1	32%	10	65%	20	100%	31	1.39
	Staff	5%	2	26%	10	68%	26	100%	38	1.37
	Other/Prefer not to answer	25%	1	25%	1	50%	2	100%	4	1.75
	Overall	5%	4	31%	25	64%	52	100%	81	1.41

The most recent **percentage of faculty/managerial staff who are diverse** was 21% and the target of 18.5% was rated by a majority, 55%, as “too low,” as demonstrated in Table 16. Notably, the **percentage of faculty/managerial staff who are diverse** 2025 target has been exceeded in Fall 2020, and a majority voiced that the target was “too low,” indicating a willingness to support higher targets in the future. The overall mean rating of the target was 1.46, “too low,” with Faculty and Staff also rating the target as “too low,” but Administrators and those who did not provide their role rating the target as “about right.” Likewise, the stretch target for **percentage of faculty/managerial staff who are diverse** of 20% was rated by a majority, 63%, as “too low.” Notice as well, the **percentage of faculty/managerial staff who are diverse** 2025 stretch target has also been exceeded in Fall 2020, and a majority voiced the stretch target was “too low,” indicating a willingness to support higher stretch targets in the future. The overall mean rating of the stretch target was 1.38, “too low,” again with Faculty and Staff also rating the target as “too low,” but Administrators and those who did not provide their role rating the target as “about right.”

<b>Table 16 - Goal 3 Metrics Targets and Stretch Targets Feedback by Role: Diverse Faculty/managerial staff</b>										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 3?" and "Would you like to provide feedback on the targets and stretch targets for Goal 3?": Below are the most recent values for each metric for Goal 3 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 3 is appropriate?										
Metric Targets	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Percentage of faculty/managerial staff who are diverse, Current =21%; Target = 18.5%; Stretch Target = 20%	Administrator	10%	1	30%	3	60%	6	100%	10	1.50
	Faculty	0%	0	39%	12	61%	19	100%	31	1.39
	Staff	0%	0	48%	19	53%	21	100%	40	1.48
	Other/Prefer not to answer	0%	0	75%	3	25%	1	100%	4	1.75
	<b>Overall</b>	<b>1%</b>	<b>1</b>	<b>44%</b>	<b>37</b>	<b>55%</b>	<b>47</b>	<b>100%</b>	<b>85</b>	<b>1.46</b>
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	13%	1	25%	2	63%	5	100%	8	1.50
	Faculty	0%	0	39%	12	61%	19	100%	31	1.39
	Staff	0%	0	32%	12	68%	26	100%	38	1.32
	Other/Prefer not to answer	0%	0	75%	3	25%	1	100%	4	1.75
	<b>Overall</b>	<b>1%</b>	<b>1</b>	<b>36%</b>	<b>29</b>	<b>63%</b>	<b>51</b>	<b>100%</b>	<b>81</b>	<b>1.38</b>

To summarize Goal 3 2025 targets and stretch targets, overall all mean ratings were rated as “too low.” Faculty and staff rated all Goal 3 targets and stretch targets as “too low,” however, those who did not provide their role rated all targets and stretch targets as “about right.” Administrators rated target and stretch targets for **satisfaction of faculty, staff, and administrators** as “too low,” but rated targets and stretch targets for **percentage of faculty/managerial staff who are diverse** and **percentage of full-time employees with salaries at or above the median** as “about right.”

**Winthrop Goal 1: Support inclusive excellence by expanding our impact on students and our communities through enrollment growth and increases in retention and graduation rates.**

About 29% of the 304 respondents gave feedback on the appropriateness of the Winthrop Plan Goal 1 metrics. Goals 1 and 4 are tied for 2<sup>nd</sup> highest percentage of respondents who elected to provide feedback. Recall, Goal 1 had the highest level of overall involvement, 65%, and the lowest success rate at meeting targets, 40%.

**Winthrop Plan Goal 1 Metrics**

Respondents were asked to rate each of the five metrics for Goal 1 on its appropriateness as a measure of progress. Table 17 presents the respondent ratings overall and by role. Results are presented in descending order,

with highest overall ratings of combined “appropriate” and “somewhat appropriate” responses at the top of the table.

Respondents rated **graduation rate** highest within Goal 1, as 97% indicated it was at least a “somewhat appropriate” metric. **Retention rate** and **headcount** each had 95% of respondents rating them as at least a “somewhat appropriate” metric. **Placement rate** and **student diversity** had the lowest ratings, with 90% and 84% respectively, rating each as at least a “somewhat appropriate” metric.

Ratings were given on a four-point scale, with four being “appropriate,” three being “somewhat appropriate,” two being “somewhat inappropriate,” and one being “inappropriate.” Based on the scale values, means above 3.50 are considered to be “appropriate,” means between 3.49 and 2.50 are considered to be “somewhat appropriate,” means between 2.49 and 1.50 are considered to be “somewhat inappropriate,” and means less than 1.50 are considered to be “inappropriate.” **Graduation rate** had an overall mean appropriateness rating of 3.62, “appropriate,” with all group means also in the “appropriate” range. The overall mean for appropriateness for **retention rate** was 3.73 and for **headcount** was 3.60, both in “appropriate” range, with all group means within these metrics also in the “appropriate” range.

The remaining metrics for Goal 1 had mean overall ratings in the “somewhat appropriate” range. The overall mean appropriateness for **placement rate** was 3.40, “somewhat appropriate,” with all group means also in the “somewhat appropriate” range. The overall mean appropriateness for **student diversity** was 3.48, “somewhat appropriate.” Group means for **student diversity** were mixed, as Administrators and Staff were in the “somewhat appropriate” range like the overall mean, but Faculty and those who did not identify their role were in the “appropriate” range. In interpreting results, please notice the extremely small number of those who did not identify their role that responded to Goal 1 questions – only three respondents.

In summary, mean ratings of appropriateness for **graduation rate**, **retention rate** and **headcount** were rated as “appropriate” overall and by all groups. **Placement rate** was rated overall and by all groups as “somewhat appropriate.” **Student diversity** was also rated overall as “somewhat appropriate,” although Administrators and Staff rated student diversity as “somewhat appropriate,” Faculty and those who did not provide their role showed higher support for the metric by rating it “appropriate.”

Table 17 - Goal 1 Metrics Feedback by Role														
If "Yes" to "Would you like to provide feedback on the metrics for Goal 1?": Below are the metrics chosen to measure success for Goal 1. Do you believe each metric is appropriate as one of the indicators of success for Goal 1?														
Metric	Role	Appropriate (4)		Somewhat appropriate (3)		Somewhat inappropriate (2)		Inappropriate (1)		Don't know*		Overall		Mean*
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Six-year graduation rate - FirstTime/Full-Time Freshmen	Administrator	80%	8	20%	2	0%	0	0%	0	0%	0	100%	10	3.80
	Faculty	61%	25	37%	15	2%	1	0%	0	0%	0	100%	41	3.59
	Staff	65%	22	29%	10	0%	0	3%	1	3%	1	100%	34	3.61
	Other/Prefer not to answer	67%	2	33%	1	0%	0	0%	0	0%	0	100%	3	3.67
	<b>Overall</b>	<b>65%</b>	<b>57</b>	<b>32%</b>	<b>28</b>	<b>1%</b>	<b>1</b>	<b>1%</b>	<b>1</b>	<b>1%</b>	<b>1</b>	<b>100%</b>	<b>88</b>	<b>3.62</b>
One-year retention rate - FirstTime/Full-Time Freshmen	Administrator	90%	9	10%	1	0%	0	0%	0	0%	0	100%	10	3.90
	Faculty	73%	30	20%	8	7%	3	0%	0	0%	0	100%	41	3.66
	Staff	79%	27	18%	6	3%	1	0%	0	0%	0	100%	34	3.76
	Other/Prefer not to answer	67%	2	33%	1	0%	0	0%	0	0%	0	100%	3	3.67
	<b>Overall</b>	<b>77%</b>	<b>68</b>	<b>18%</b>	<b>16</b>	<b>5%</b>	<b>4</b>	<b>0%</b>	<b>0</b>	<b>0%</b>	<b>0</b>	<b>100%</b>	<b>88</b>	<b>3.73</b>
Total headcount enrollment	Administrator	80%	8	10%	1	0%	0	10%	1	0%	0	100%	10	3.60
	Faculty	63%	26	29%	12	7%	3	0%	0	0%	0	100%	41	3.56
	Staff	62%	21	35%	12	0%	0	0%	0	3%	1	100%	34	3.64
	Other/Prefer not to answer	67%	2	33%	1	0%	0	0%	0	0%	0	100%	3	3.67
	<b>Overall</b>	<b>65%</b>	<b>57</b>	<b>30%</b>	<b>26</b>	<b>3%</b>	<b>3</b>	<b>1%</b>	<b>1</b>	<b>1%</b>	<b>1</b>	<b>100%</b>	<b>88</b>	<b>3.60</b>
Post graduation placement rate of undergraduates into employment, advanced education and/or military service	Administrator	40%	4	40%	4	10%	1	10%	1	0%	0	100%	10	3.10
	Faculty	59%	24	32%	13	5%	2	5%	2	0%	0	100%	41	3.44
	Staff	53%	18	38%	13	6%	2	0%	0	3%	1	100%	34	3.48
	Other/Prefer not to answer	0%	0	100%	3	0%	0	0%	0	0%	0	100%	3	3.00
	<b>Overall</b>	<b>52%</b>	<b>46</b>	<b>38%</b>	<b>33</b>	<b>6%</b>	<b>5</b>	<b>3%</b>	<b>3</b>	<b>1%</b>	<b>1</b>	<b>100%</b>	<b>88</b>	<b>3.40</b>
Percentage of students who are diverse	Administrator	70%	7	10%	1	10%	1	10%	1	0%	0	100%	10	3.40
	Faculty	63%	25	25%	10	8%	3	3%	1	3%	1	100%	40	3.51
	Staff	56%	19	24%	8	15%	5	0%	0	6%	2	100%	34	3.44
	Other/Prefer not to answer	67%	2	33%	1	0%	0	0%	0	0%	0	100%	3	3.67
	<b>Overall</b>	<b>61%</b>	<b>53</b>	<b>23%</b>	<b>20</b>	<b>10%</b>	<b>9</b>	<b>2%</b>	<b>2</b>	<b>3%</b>	<b>3</b>	<b>100%</b>	<b>87</b>	<b>3.48</b>
**"Don't know" excluded from calculation of mean														

### Winthrop Plan Goal 1 Metric 2025 Targets

About 19% of the 304 respondents gave feedback on targets and stretch targets for the Winthrop Plan Goal 1 metrics. This is the 3<sup>rd</sup> highest rate of response to provide feedback on targets. Targets rated overall as “too high” will be discussed first, followed by those rated as “about right.” No targets within Goal 1 were rated “too low.” Ratings used a 3-point scale with 3 being “too high,” 2 being “about right,” and 1 being “too low.” Based on the scale values, means above 2.50 are considered to be “too high,” means between 2.49 and 1.50 are considered to be “about right,” and means less than 1.50 are considered to be “too low.”

**Enrollment** in Fall 2020 was 5,576. As shown in the Table 18, a majority, 55%, rated the **enrollment** target of 7,000 as “too high,” however, the overall mean rating of the target was 2.48, “about right,” with all group means rating the target as “too high,” except for Faculty whose group mean, 2.29, “about right” range. The **enrollment** stretch target of 7,500 was also rated by a majority, 70%, as “too high.” The overall mean rating of the stretch target was 2.65, “too high.” Again, all groups, except Faculty, rated stretch targets as “too high.” The group mean for Faculty was 2.48, “about right.”

Table 18 - Goal 1 Metrics Targets and Stretch Targets Feedback by Role: Enrollment										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 1?" and "Would you like to provide feedback on the targets and stretch targets for Goal 1?": Below are the most recent values for each metric for Goal 1 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 1 is appropriate?										
Metric	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Total headcount enrollment, Current = 5576; Target = 7000; Stretch Target = 7500	Administrator	67%	6	33%	3	0%	0	100%	9	2.67
	Faculty	39%	11	50%	14	11%	3	100%	28	2.29
	Staff	64%	14	32%	7	5%	1	100%	22	2.59
	Other/Prefer not to answer	100%	3	0%	0	0%	0	100%	3	3.00
	<b>Overall</b>	<b>55%</b>	<b>34</b>	<b>39%</b>	<b>24</b>	<b>6%</b>	<b>4</b>	<b>100%</b>	<b>62</b>	<b>2.48</b>
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	71%	5	29%	2	0%	0	100%	7	2.71
	Faculty	59%	16	30%	8	11%	3	100%	27	2.48
	Staff	80%	16	20%	4	0%	0	100%	20	2.80
	Other/Prefer not to answer	100%	3	0%	0	0%	0	100%	3	3.00
	<b>Overall</b>	<b>70%</b>	<b>40</b>	<b>25%</b>	<b>14</b>	<b>5%</b>	<b>3</b>	<b>100%</b>	<b>57</b>	<b>2.65</b>

The targets and stretch targets of the other Goal 1 metrics were rated by a majority as “about right.” **Retention rate** was 70% in Fall 2020. As shown in the Table 19, the target of 82% was rated by a majority, 66%, as “about right.” The overall mean rating of the target was 2.18, “about right,” with all group means similarly indicating “about right.” Likewise, the stretch target for **retention rate** of 85% was rated by a majority, 61%, as “about right.” The overall mean rating of the stretch target was 2.25, “about right,” with all group means within the “about right” range, except for those who did not identify their role with a group mean of 2.67, “too high.” Interpretation of this group’s results should take into account only three respondents identified to this group.

Table 19 - Goal 1 Metrics Targets and Stretch Targets Feedback by Role: Retention										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 1?" and "Would you like to provide feedback on the targets and stretch targets for Goal 1?": Below are the most recent values for each metric for Goal 1 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 1 is appropriate?										
Metric	Role	Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
One-year retention rate - FirstTime/Full-Time Freshmen, Current = 70%; Target = 82%; Stretch Target = 85%	Administrator	33%	3	67%	6	0%	0	100%	9	2.33
	Faculty	29%	8	57%	16	14%	4	100%	28	2.14
	Staff	18%	4	77%	17	5%	1	100%	22	2.14
	Other/Prefer not to answer	33%	1	67%	2	0%	0	100%	3	2.33
	Overall	26%	16	66%	41	8%	5	100%	62	2.18
	Role	Stretch Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	29%	2	71%	5	0%	0	100%	7	2.29
	Faculty	31%	8	58%	15	12%	3	100%	26	2.19
	Staff	30%	6	65%	13	5%	1	100%	20	2.25
	Other/Prefer not to answer	67%	2	33%	1	0%	0	100%	3	2.67
	Overall	32%	18	61%	34	7%	4	100%	56	2.25

The most recent **graduation rate** was 61%, with the target of 61% rated by a majority, 65%, as “about right.” Additionally, as shown in Table 20, the overall mean rating of the target was 1.68, “about right,” with the mean for each group also in the “about right” range. Of note, despite the 2025 **graduation rate** target having been met in Fall 2020, a majority of respondents rated that target “about right,” rather than “too low,” indicating support for maintaining achieved levels rather than raising targets. The stretch target for **graduation rate** of 65% was rated by a majority, 64%, as “about right.” The overall mean rating of the stretch target was 1.68, “about right,” with all group means also in the “about right” range.

**Table 20 - Goal 1 Metrics Targets and Stretch Targets Feedback by Role: Graduation Rate**

If "Yes" to both "Would you like to provide feedback on the metrics for Goal 1?" and "Would you like to provide feedback on the targets and stretch targets for Goal 1?": Below are the most recent values for each metric for Goal 1 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 1 is appropriate?

Metric	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Six-year graduation rate - FirstTime/Full-Time Freshmen, Current = 61%; Target = 61%; Stretch Target = 65%	Administrator	0%	0	67%	6	33%	3	100%	9	1.67
	Faculty	0%	0	64%	18	36%	10	100%	28	1.64
	Staff	5%	1	59%	13	36%	8	100%	22	1.68
	Other/Prefer not to answer	0%	0	100%	3	0%	0	100%	3	2.00
	<b>Overall</b>	<b>2%</b>	<b>1</b>	<b>65%</b>	<b>40</b>	<b>34%</b>	<b>21</b>	<b>100%</b>	<b>62</b>	<b>1.68</b>
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	0%	0	71%	5	29%	2	100%	7	1.71
	Faculty	0%	0	58%	15	42%	11	100%	26	1.58
	Staff	5%	1	65%	13	30%	6	100%	20	1.75
	Other/Prefer not to answer	0%	0	100%	3	0%	0	100%	3	2.00
	<b>Overall</b>	<b>2%</b>	<b>1</b>	<b>64%</b>	<b>36</b>	<b>34%</b>	<b>19</b>	<b>100%</b>	<b>56</b>	<b>1.68</b>

The most recent post-graduation **placement rate** was 87% and the target of 92% was rated by an overall majority, 82%, as "about right." As shown in Table 21, the overall mean rating of the target was 2.15, "about right," with all groups in the "about right" range. The stretch target for **placement rate** of 95% was rated by an overall majority, 68%, as "about right." The overall mean rating of the stretch target was 2.32, "about right," with all group means in the "about right" range.

Table 21 - Goal 1 Metrics Targets and Stretch Targets Feedback by Role: Placement Rate										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 1?" and "Would you like to provide feedback on the targets and stretch targets for Goal 1?": Below are the most recent values for each metric for Goal 1 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 1 is appropriate?										
Metric	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Post graduation placement rate of undergraduates into employment, advanced education and/or military service Current = 87%; Target = 92%; Stretch Target = 95%	Administrator	22%	2	78%	7	0%	0	100%	9	2.22
	Faculty	14%	4	82%	23	4%	1	100%	28	2.11
	Staff	18%	4	82%	18	0%	0	100%	22	2.18
	Other/Prefer not to answer	0%	0	100%	3	0%	0	100%	3	2.00
	<b>Overall</b>	<b>16%</b>	<b>10</b>	<b>82%</b>	<b>51</b>	<b>2%</b>	<b>1</b>	<b>100%</b>	<b>62</b>	<b>2.15</b>
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	43%	3	57%	4	0%	0	100%	7	2.43
	Faculty	35%	9	65%	17	0%	0	100%	26	2.35
	Staff	25%	5	75%	15	0%	0	100%	20	2.25
	Other/Prefer not to answer	33%	1	67%	2	0%	0	100%	3	2.33
	<b>Overall</b>	<b>32%</b>	<b>18</b>	<b>68%</b>	<b>38</b>	<b>0%</b>	<b>0</b>	<b>100%</b>	<b>56</b>	<b>2.32</b>

The **percentage of students who were diverse** in Fall 2020 was 45%. As shown in Table 22, the target of 43% was rated by an overall majority, 57%, as “about right.” The overall mean rating for the target was 1.70, “about right,” with all group means in the “about right” range. The stretch target for **percentage of students who are diverse** of 45% was rated by a majority, 57%, as “about right.” The overall mean rating for the stretch target was 1.71, “about right,” with all group means in the “about right” range. Of note, though the 2025 target and stretch target for **percentage of students who are diverse** were both exceeded in Fall 2020, a majority rated the target and stretch target as “about right,” rather than “too low,” indicating support for maintaining achieved levels rather than raising targets and stretch targets.



**Table 22 - Goal 1 Metrics Targets and Stretch Targets Feedback by Role: Diverse Students**

If "Yes" to both "Would you like to provide feedback on the metrics for Goal 1?" and "Would you like to provide feedback on the targets and stretch targets for Goal 1?": Below are the most recent values for each metric for Goal 1 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 1 is appropriate?

Metric	Role	Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Percentage of students who are diverse, Current = 45%; Target = 43%; Stretch Target = 45%	Administrator	11%	1	44%	4	44%	4	100%	9	1.67
	Faculty	7%	2	54%	15	39%	11	100%	28	1.68
	Staff	5%	1	62%	13	33%	7	100%	21	1.71
	Other/Prefer not to answer	0%	0	100%	3	0%	0	100%	3	2.00
	Overall	7%	4	57%	35	36%	22	100%	61	1.70
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	14%	1	29%	2	57%	4	100%	7	1.57
	Faculty	7%	2	59%	16	33%	9	100%	27	1.74
	Staff	5%	1	58%	11	37%	7	100%	19	1.68
	Other/Prefer not to answer	0%	0	100%	3	0%	0	100%	3	2.00
	Overall	7%	4	57%	32	36%	20	100%	56	1.71

To summarize Goal 1 2025 targets, with one exception, all mean ratings for targets overall and by all groups were rated as “about right.” The exception is **enrollment**. Though overall the target is seen as “about right,” only Faculty rated the **enrollment** target as “about right.” All other groups rated the **enrollment** target as “too high.”

To summarize Goal 1 2025 stretch targets, mean ratings for **graduation rate**, **placement rate**, and **percentage of students** who are diverse were rated overall and by all groups as “about right.” The stretch target for **retention rate** was rated overall and by all groups as “about right,” with the exception of those who did not provide their role, instead indicating the stretch target as “too high.” The stretch target for **enrollment** was seen as “too high” overall and by all groups, with the exception of Faculty who rated the stretch target as “about right.”

#### **Winthrop Goal 4: Provide facilities, technology, and programs that support Winthrop students and the overall Winthrop experience.**

About 29% of the 304 respondents chose to give feedback on the appropriateness of the Winthrop Plan Goal 4 metrics. Goal 4 is tied with Goal 1 for the 2<sup>nd</sup> highest percentage of respondents choosing to give feedback on its metrics. Recall Goal 4 had the 3<sup>rd</sup> highest overall involvement, 45%, and the 3<sup>rd</sup> highest success rate for meeting targets, 56%.

### Winthrop Plan Goal 4 Metrics

Respondents were asked to rate each of the four metrics for Goal 4 on its appropriateness as a measure of progress. Table 23 presents the ratings overall and by role. Results are presented in descending order, with highest overall respondent ratings of combined “appropriate” and “somewhat appropriate” at the top of the table.

Table 23 - Goal 4 Metrics Feedback by Role														
If "Yes" to "Would you like to provide feedback on the metrics for Goal 4?": Below are the metrics chosen to measure success for Goal 4. Do you believe each metric is appropriate as one of the indicators of success for Goal 4?														
Metric	Role	Appropriate (4)		Somewhat appropriate (3)		Somewhat inappropriate (2)		Inappropriate (1)		Don't know*		Overall		Mean*
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Student satisfaction with support services	Administrator	64%	7	36%	4	0%	0	0%	0	0%	0	100%	11	3.64
	Faculty	68%	25	19%	7	11%	4	0%	0	3%	1	100%	37	3.58
	Staff	72%	26	22%	8	6%	2	0%	0	0%	0	100%	36	3.67
	Other/Prefer not to answer	50%	2	25%	1	0%	0	25%	1	0%	0	100%	4	3.00
	<b>Overall</b>	<b>68%</b>	<b>60</b>	<b>23%</b>	<b>20</b>	<b>7%</b>	<b>6</b>	<b>1%</b>	<b>1</b>	<b>1%</b>	<b>1</b>	<b>100%</b>	<b>88</b>	<b>3.60</b>
Number of classrooms upgraded with technology	Administrator	73%	8	18%	2	9%	1	0%	0	0%	0	100%	11	3.64
	Faculty	54%	20	27%	10	8%	3	11%	4	0%	0	100%	37	3.24
	Staff	78%	29	16%	6	3%	1	0%	0	3%	1	100%	37	3.78
	Other/Prefer not to answer	50%	2	25%	1	25%	1	0%	0	0%	0	100%	4	3.25
	<b>Overall</b>	<b>66%</b>	<b>59</b>	<b>21%</b>	<b>19</b>	<b>7%</b>	<b>6</b>	<b>4%</b>	<b>4</b>	<b>1%</b>	<b>1</b>	<b>100%</b>	<b>89</b>	<b>3.51</b>
Expenditures on facilities	Administrator	64%	7	36%	4	0%	0	0%	0	0%	0	100%	11	3.64
	Faculty	51%	19	32%	12	5%	2	11%	4	0%	0	100%	37	3.24
	Staff	65%	24	22%	8	0%	0	8%	3	5%	2	100%	37	3.51
	Other/Prefer not to answer	50%	2	25%	1	0%	0	25%	1	0%	0	100%	4	3.00
	<b>Overall</b>	<b>58%</b>	<b>52</b>	<b>28%</b>	<b>25</b>	<b>2%</b>	<b>2</b>	<b>9%</b>	<b>8</b>	<b>2%</b>	<b>2</b>	<b>100%</b>	<b>89</b>	<b>3.39</b>
Number of online/hybrid degree programs	Administrator	45%	5	36%	4	18%	2	0%	0	0%	0	100%	11	3.27
	Faculty	27%	10	49%	18	14%	5	11%	4	0%	0	100%	37	2.92
	Staff	64%	23	25%	9	6%	2	3%	1	3%	1	100%	36	3.45
	Other/Prefer not to answer	25%	1	50%	2	0%	0	25%	1	0%	0	100%	4	2.75
	<b>Overall</b>	<b>44%</b>	<b>39</b>	<b>38%</b>	<b>33</b>	<b>10%</b>	<b>9</b>	<b>7%</b>	<b>6</b>	<b>1%</b>	<b>1</b>	<b>100%</b>	<b>88</b>	<b>3.17</b>
* "Don't know" excluded from calculation of mean														

**Student satisfaction with support services** received the highest overall percentage rating, with 91% indicating it was at least a “somewhat appropriate” metric. **Number of classrooms upgraded with technology** had the second highest rating of metric appropriateness, as 87% rated it as at least “somewhat appropriate.” **Expenditures on facilities** had the next highest rating of metric appropriateness, as 86% rated it as at least “somewhat appropriate.” **Number of online/hybrid degree programs** had the lowest rating of appropriateness, as 82% rated it as at least a “somewhat appropriate” metric.

Ratings were given on a four-point scale, with four being “appropriate,” three being “somewhat appropriate,” two being “somewhat inappropriate,” and one being “inappropriate.” Based on the scale values, means above 3.50 are considered to be “appropriate,” means between 3.49 and 2.50 are considered to be “somewhat appropriate,” means between 2.49 and 1.50 are considered to be “somewhat inappropriate,” and means less than 1.50 are considered to be “inappropriate.” The overall mean appropriateness was 3.60, “appropriate,” for **student satisfaction with support**, with means for all groups also in the “appropriate” range, with the exception of those

who did not provide their role and providing a group mean of 3.00, “somewhat appropriate.” In interpreting results, note the extremely small number of respondents not identifying their role that responded to Goal 4 questions – only four respondents. The overall mean appropriateness for **number of classrooms with upgraded technology** was 3.51, “appropriate,” with group means for Administrators and Staff also in the “appropriate” range and group means for Faculty and those who did not provide their role in the “somewhat appropriate” range.

The overall mean ratings of appropriateness for the other Goal 4 metrics are in the “somewhat appropriate” range. For **expenditures on facilities**, the overall mean appropriateness was 3.39, with group means for Faculty and those who did not provide their role, 3.24 and 3.00 respectively, also in the “somewhat appropriate” range. Administrators and Staff, however, showed greater support for the metric, as their group means for **expenditures on facilities** is in the “appropriate” range. The overall mean appropriateness was 3.17, “somewhat appropriate,” for **number of online/hybrid programs** with all group means in that same range.

In summary, **student satisfaction with support services** was rated “appropriate” overall and by all groups, with the exception of those who did not provide their role and providing a “somewhat appropriate” rating. **Number of classrooms with upgraded technology** was also rated overall as “appropriate,” with Staff and Administrators aligning with the overall rating, but Faculty and those who did not provide their role rating this metric as “somewhat appropriate.” Other metrics in Goal 4 had overall ratings of “somewhat appropriate.” Staff and Administrators rated **expenditures on facilities** “appropriate,” while the overall mean ratings and the group mean ratings for this metric were “somewhat appropriate.” The overall mean appropriateness and all group mean ratings for **number of online/hybrid programs** were in the “somewhat appropriate” range.

#### ***Winthrop Plan Goal 4 Metric 2025 Targets***

About 22% of the 304 respondents chose to give feedback on targets and stretch targets for the Winthrop Plan Goal 4 metrics. This is the 2<sup>nd</sup> highest rate of response for rating targets and stretch targets. All targets and stretch targets were generally seen as “about right” for Goal 4, therefore, they will be discussed in descending order of the proportion of respondents who rated targets as “about right.” Ratings used a three-point scale with three being “too high,” two being “about right,” and one being “too low.” Based on the scale values, means above 2.50 are considered to be “too high,” means between 2.49 and 1.50 are considered to be “about right,” and means less than 1.50 are considered to be “too low.”

The most current score of **student satisfaction with support services** was 80%. As shown in the Table 24, a majority, 87%, rated the **student satisfaction with support** target of 85% as “about right.” The overall mean rating of the target was 1.96, “about right,” with all group means also in the “about right” range. A majority, 85%, rated

the **student satisfaction with support** services stretch target of 90% as “about right.” The overall mean rating of the stretch target was 2.06, “about right,” with all group means also in the “about right” range.

Table 24 - Goal 4 Metrics Targets and Stretch Targets Feedback by Role: Student Satisfaction with Support										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 4?" and "Would you like to provide feedback on the targets and stretch targets for Goal 4?": Below are the most recent values for each metric for Goal 4 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 4 is appropriate?										
Metric Targets	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Student satisfaction with support services, Current = 80%; Target = 85%; Stretch Target = 90%	Administrator	10%	1	90%	9	0%	0	100%	10	2.10
	Faculty	3%	1	84%	27	13%	4	100%	32	1.91
	Staff	4%	1	88%	22	8%	2	100%	25	1.96
	Other/Prefer not to answer	0%	0	100%	4	0%	0	100%	4	2.00
	Overall	4%	3	87%	62	8%	6	100%	71	1.96
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	13%	1	88%	7	0%	0	100%	8	2.13
	Faculty	16%	5	78%	25	6%	2	100%	32	2.09
	Staff	4%	1	92%	22	4%	1	100%	24	2.00
	Other/Prefer not to answer	0%	0	100%	4	0%	0	100%	4	2.00
	Overall	10%	7	85%	58	4%	3	100%	68	2.06

The most current **number of online/hybrid programs** was 8. As shown in Table 25, a majority, 61%, rated the number of online/hybrid programs target of 15 as “about right.” The overall mean rating of the target was 1.97, “about right,” with all group means also within the “about right” range. The **number of online/hybrid programs** stretch target of 20 was also rated by a majority, 51%, as “about right.” The overall mean rating of the stretch target was 2.10, “about right,” with all group means also in the “about right” range.

<b>Table 25 - Goal 4 Metrics Targets and Stretch Targets Feedback by Role: Online/hybrid degree programs</b>										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 4?" and "Would you like to provide feedback on the targets and stretch targets for Goal 4?": Below are the most recent values for each metric for Goal 4 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 4 is appropriate?										
Metric Targets	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Number of online/hybrid degree programs, Current = 8; Target = 15; Stretch Target = 20	Administrator	20%	2	60%	6	20%	2	100%	10	2.00
	Faculty	22%	7	59%	19	19%	6	100%	32	2.03
	Staff	12%	3	60%	15	28%	7	100%	25	1.84
	Other/Prefer not to answer	25%	1	75%	3	0%	0	100%	4	2.25
	<b>Overall</b>	<b>18%</b>	<b>13</b>	<b>61%</b>	<b>43</b>	<b>21%</b>	<b>15</b>	<b>100%</b>	<b>71</b>	<b>1.97</b>
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	13%	1	63%	5	25%	2	100%	8	1.88
	Faculty	48%	15	39%	12	13%	4	100%	31	2.35
	Staff	13%	3	58%	14	29%	7	100%	24	1.83
	Other/Prefer not to answer	25%	1	75%	3	0%	0	100%	4	2.25
	<b>Overall</b>	<b>30%</b>	<b>20</b>	<b>51%</b>	<b>34</b>	<b>19%</b>	<b>13</b>	<b>100%</b>	<b>67</b>	<b>2.10</b>

The most current **expenditures on facilities** was \$10.5 million. As shown in Table 26, a majority, 56%, rated the **expenditures on facilities** target of \$15 million as “about right.” The overall mean rating of the target was 1.70, “about right,” with all group means within the “about right” range. The **expenditures on facilities** stretch target of \$22 million was also rated by a majority, 58%, as “about right.” The overall mean rating of the stretch target was 1.85, “about right,” with all group means within the “about right” range.

**Table 26 - Goal 4 Metrics Targets and Stretch Targets Feedback by Role: Expenditures on Facilities**

If "Yes" to both "Would you like to provide feedback on the metrics for Goal 4?" and "Would you like to provide feedback on the targets and stretch targets for Goal 4?": Below are the most recent values for each metric for Goal 4 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 4 is appropriate?

Metric Targets	Role	Target								Mean	
		Too high (3)		About right (2)		Too low (1)		Overall			
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count		
Expenditures on facilities, Current = \$10.5M; Target = \$15M; Stretch Target = \$22M	Administrator	11%	1	67%	6	22%	2	100%	9	1.89	
	Faculty	6%	2	59%	19	34%	11	100%	32	1.72	
	Staff	4%	1	48%	12	48%	12	100%	25	1.56	
	Other/Prefer not to answer	25%	1	50%	2	25%	1	100%	4	2.00	
	Overall	7%	5	56%	39	37%	26	100%	70	1.70	
	Role	Stretch Target								Mean	
		Too high (3)		About right (2)		Too low (1)		Overall			
			Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
		Administrator	14%	1	71%	5	14%	1	100%	7	2.00
		Faculty	19%	6	56%	18	25%	8	100%	32	1.94
		Staff	4%	1	58%	14	38%	9	100%	24	1.67
		Other/Prefer not to answer	25%	1	50%	2	25%	1	100%	4	2.00
		Overall	13%	9	58%	39	28%	19	100%	67	1.85

The most current **number of classrooms upgraded with technology** was 38. As shown in Table 27, opinions are a bit mixed regarding the target of 60. Of all other metric targets, the overall majority (greater than 50%) was found in one of the ratings: "too high," "about right," or "too low," except for the ratings of targets for **number of classrooms upgraded with technology**. Most ratings, but not a majority, 49%, rated the target as "about right," followed by 39% who rated it at "too low," and 11% who rated it as "too high." The overall mean rating of the target was 1.72, "about right," with all group means in the "about right" range, with the exception of those who did not provide their role and had a group mean of 1.00, "too low." Again, caution advised interpreting results of this group as the number of respondents in this group is quite low, just four.

Similarly, no overall majority opinion (greater than 50%) was observed in the overall ratings of the stretch target of 62 for **number of classrooms upgraded with technology**. An equal percentage of ratings, 44%, rated the stretch target as "about right" as rated it as "too low." The overall mean rating of the stretch target was 1.68, "about right," again with all group means within the "about right" range, with the exception of those who did not provide their role and had a group mean of 1.00, "too low."

**Table 27 - Goal 4 Metrics Targets and Stretch Targets Feedback by Role: Classrooms with Upgraded Technology**

If "Yes" to both "Would you like to provide feedback on the metrics for Goal 4?" and "Would you like to provide feedback on the targets and stretch targets for Goal 4?": Below are the most recent values for each metric for Goal 4 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 4 is appropriate?

Metric Targets	Role	Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Number of classrooms upgraded with technology, Current =38; Target = 60; Stretch Target = 62	Administrator	22%	2	44%	4	33%	3	100%	9	1.89
	Faculty	9%	3	50%	16	41%	13	100%	32	1.69
	Staff	12%	3	58%	15	31%	8	100%	26	1.81
	Other/Prefer not to answer	0%	0	0%	0	100%	4	100%	4	1.00
	Overall	11%	8	49%	35	39%	28	100%	71	1.72
	Role	Stretch Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	14%	1	29%	2	57%	4	100%	7	1.57
	Faculty	13%	4	47%	15	41%	13	100%	32	1.72
	Staff	12%	3	52%	13	36%	9	100%	25	1.76
	Other/Prefer not to answer	0%	0	0%	0	100%	4	100%	4	1.00
	Overall	12%	8	44%	30	44%	30	100%	68	1.68

In summary, the mean ratings for all Goal 4 2025 targets and stretch targets were rated overall and by all groups as “about right” with one exception - those who did not provide their role rated the target and stretch target for **number of classrooms with upgraded with technology** as “too low.”

#### **Winthrop Goal 5: Ensure financial stability and sustainability.**

About 26% of the 304 respondents gave feedback on the appropriateness of the Winthrop Plan Goal 5 metrics. Of note, this is the 4th highest rate of response among the five Winthrop Plan Goal Metrics, indicating modest interest in providing feedback for the Goal 5 Metrics.

#### **Winthrop Plan Goal 5 Metrics**

All Goal 5 metrics were rated by the overall majority of respondents as “appropriate.” Results in Table 28 are presented in descending order with highest overall respondent ratings of combined “appropriate” and “somewhat appropriate” presented first. As shown in the table, respondents rated **endowment** the most appropriate metric, as 89% indicated it was at least “somewhat appropriate.” The overall mean appropriateness was 3.70, with all group mean ratings also in the “appropriate” range. **Scholarship/grant dollars from University & Foundation** had the second highest rating of metric appropriateness, as 88% of ratings indicating it as at least “somewhat appropriate.” The overall mean appropriateness was 3.59, “appropriate,” again with all group means

in the “appropriate” range. **Debt ratio** had the next highest rating of appropriateness, as 87% rated it as at least a “somewhat appropriate” metric. The overall mean appropriateness was 3.77, “appropriate,” with all groups aligning with the overall rating of “appropriate.” **Unrestricted gift revenues** had the next highest rating of metric appropriateness, as 86% rated it as at least “somewhat appropriate.” The overall mean appropriateness was 3.58, “appropriate,” with all groups in the “appropriate” range, with the exception of Staff, whose group mean of 3.33 is in the “somewhat appropriate” range.

**Alumni giving rates** had the lowest rating of appropriateness, as 82% rated it as at least a “somewhat appropriate” metric. The overall mean appropriateness was 3.44, “somewhat appropriate,” with group means for Administrators and Staff also in the “somewhat appropriate” range. Faculty and those who did not provide their role indicated more support for this metric, as their group means were in the “appropriate” range.

Table 28 - Goal 5 Metrics Feedback by Role														
If "Yes" to "Would you like to provide feedback on the metrics for Goal 5?": Below are the metrics chosen to measure success for Goal 5. Do you believe each metric is appropriate as one of the indicators of success for Goal 5?														
Metric	Role	Appropriate (4)		Somewhat appropriate (3)		Somewhat inappropriate (2)		Inappropriate (1)		Don't know*		Overall		Mean*
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Total endowment assets	Administrator	78%	7	22%	2	0%	0	0%	0	0%	0	100%	9	3.78
	Faculty	84%	31	5%	2	3%	1	0%	0	8%	3	100%	37	3.88
	Staff	70%	21	13%	4	3%	1	10%	3	3%	1	100%	30	3.48
	Other/Prefer not to answer	50%	2	50%	2	0%	0	0%	0	0%	0	100%	4	3.50
	<b>Overall</b>	<b>76%</b>	<b>61</b>	<b>13%</b>	<b>10</b>	<b>3%</b>	<b>2</b>	<b>4%</b>	<b>3</b>	<b>5%</b>	<b>4</b>	<b>100%</b>	<b>80</b>	<b>3.70</b>
Scholarship/grant dollars provided to students from University & Foundation	Administrator	78%	7	22%	2	0%	0	0%	0	0%	0	100%	9	3.78
	Faculty	73%	27	16%	6	3%	1	0%	0	8%	3	100%	37	3.76
	Staff	67%	20	17%	5	0%	0	13%	4	3%	1	100%	30	3.41
	Other/Prefer not to answer	50%	2	25%	1	0%	0	25%	1	0%	0	100%	4	3.00
	<b>Overall</b>	<b>70%</b>	<b>56</b>	<b>18%</b>	<b>14</b>	<b>1%</b>	<b>1</b>	<b>6%</b>	<b>5</b>	<b>5%</b>	<b>4</b>	<b>100%</b>	<b>80</b>	<b>3.59</b>
Institutional debt ratio (debts divided by assets)	Administrator	78%	7	22%	2	0%	0	0%	0	0%	0	100%	9	3.78
	Faculty	70%	26	16%	6	0%	0	0%	0	14%	5	100%	37	3.81
	Staff	73%	22	10%	3	3%	1	3%	1	10%	3	100%	30	3.70
	Other/Prefer not to answer	75%	3	0%	0	0%	0	0%	0	25%	1	100%	4	4.00
	<b>Overall</b>	<b>73%</b>	<b>58</b>	<b>14%</b>	<b>11</b>	<b>1%</b>	<b>1</b>	<b>1%</b>	<b>1</b>	<b>11%</b>	<b>9</b>	<b>100%</b>	<b>80</b>	<b>3.77</b>
Unrestricted gift revenues	Administrator	67%	6	22%	2	11%	1	0%	0	0%	0	100%	9	3.56
	Faculty	78%	29	8%	3	5%	2	0%	0	8%	3	100%	37	3.79
	Staff	67%	20	13%	4	7%	2	13%	4	0%	0	100%	30	3.33
	Other/Prefer not to answer	75%	3	25%	1	0%	0	0%	0	0%	0	100%	4	3.75
	<b>Overall</b>	<b>73%</b>	<b>58</b>	<b>13%</b>	<b>10</b>	<b>6%</b>	<b>5</b>	<b>5%</b>	<b>4</b>	<b>4%</b>	<b>3</b>	<b>100%</b>	<b>80</b>	<b>3.58</b>
Alumni giving rates	Administrator	78%	7	0%	0	11%	1	11%	1	0%	0	100%	9	3.44
	Faculty	68%	25	19%	7	8%	3	0%	0	5%	2	100%	37	3.63
	Staff	57%	17	17%	5	10%	3	13%	4	3%	1	100%	30	3.21
	Other/Prefer not to answer	50%	2	50%	2	0%	0	0%	0	0%	0	100%	4	3.50
	<b>Overall</b>	<b>64%</b>	<b>51</b>	<b>18%</b>	<b>14</b>	<b>9%</b>	<b>7</b>	<b>6%</b>	<b>5</b>	<b>4%</b>	<b>3</b>	<b>100%</b>	<b>80</b>	<b>3.44</b>
**Don't know" excluded from calculation of mean														



### ***Winthrop Plan Goal 5 Metric 2025 Targets***

About 18% of the 304 respondents chose to give feedback on values of the targets and stretch targets for the Winthrop Plan Goal 5 metrics. This is the 4th highest rate of response among the five Winthrop Plan Goal Metric Targets, indicating modest interest in providing feedback for the Goal 5 Metrics and Targets. Ratings used a three-point scale with three being “too high,” two being “about right,” and one being “too low.” Based on the scale values, means above 2.50 are considered to be “too high,” means between 2.49 and 1.50 are considered to be “about right,” and means less than 1.50 are considered to be “too low.” Goal 5 targets were rated by the overall majority as “about right,” except for the **scholarship/grant dollars from University & Foundation** target, which was rated by the overall majority as “too low.” This target will be discussed first, then the remaining targets will be discussed in descending order based on percentage of respondents rating the target as “about right.”

The current amount of **scholarship/grant dollars from University & Foundation** is \$20,800,000. As shown in Table 29, a majority, 66%, rated the **scholarship/grant dollars from University & Foundation** target of \$20,000,000 as “too low.” Of note, the **scholarship/grant dollars from University & Foundation** 2025 target was exceeded in FY2019-20 and with the majority of respondents indicating the target is “too low,” there is support for increasing future targets. The overall mean rating was 1.36, “too low,” with Faculty and Staff group means also in the “too low” range. Administrators and those who did not identify their role, however, each had group mean ratings of 1.50, “about right.” The **scholarship/grant dollars from University & Foundation** stretch target of \$22,000,000 was also rated by a majority, 69%, as “too low.” The overall mean rating of the stretch target was 1.31, “too low,” with all group means also in the “too low” range, with the exception of those who did not identify their role, whose group mean of 1.50, “about right” range. With just three respondents in this respondent group, caution should be observed when interpreting results from this group.

**Table 29 - Goal 5 Metrics Targets and Stretch Targets Feedback by Role: Scholarships/ Grants from University & Foundation**

If "Yes" to both "Would you like to provide feedback on the metrics for Goal 5?" and "Would you like to provide feedback on the targets and stretch targets for Goal 5?": Below are the most recent values for each metric for Goal 5 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 5 is appropriate?

Metric Targets	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Scholarship/grant dollars provided to students from University & Foundation, Current = \$20.8M; Target = \$20M; Stretch Target = \$22M	Administrator	0%	0	50%	3	50%	3	100%	6	1.50
	Faculty	0%	0	32%	9	68%	19	100%	28	1.32
	Staff	5%	1	25%	5	70%	14	100%	20	1.35
	Other/Prefer not to answer	0%	0	50%	1	50%	1	100%	2	1.50
	Overall	2%	1	32%	18	66%	37	100%	56	1.36
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count		
	Administrator	0%	0	40%	2	60%	3	100%	5	1.40
	Faculty	0%	0	25%	7	75%	21	100%	28	1.25
	Staff	0%	0	37%	7	63%	12	100%	19	1.37
	Other/Prefer not to answer	0%	0	50%	1	50%	1	100%	2	1.50
	Overall	0%	0	31%	17	69%	37	100%	54	1.31

The most current **debt ratio** is .365. As shown in the Table 30, a majority, 69%, rated the **debt ratio** target of .40 as “about right.” Of note, the **debt ratio** 2025 target was exceeded in FY2019-20, however the majority still rated the target as “about right,” indicating support for staying the course rather than decreasing targets. The overall mean rating of the target was 2.09, “about right,” with all group means also in the “about right” range.

**Table 30 - Goal 5 Metrics Targets and Stretch Targets Feedback by Role: Debt Ratio**

If "Yes" to both "Would you like to provide feedback on the metrics for Goal 5?" and "Would you like to provide feedback on the targets and stretch targets for Goal 5?": Below are the most recent values for each metric for Goal 5 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 5 is appropriate?

Metric Targets	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Institutional debt ratio, Current = .365; Target = .40; Stretch Target = .35	Administrator	17%	1	83%	5	0%	0	100%	6	2.17
	Faculty	32%	9	50%	14	18%	5	100%	28	2.14
	Staff	5%	1	89%	17	5%	1	100%	19	2.00
	Other/Prefer not to answer	0%	0	100%	2	0%	0	100%	2	2.00
	Overall	20%	11	69%	38	11%	6	100%	55	2.09
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	20%	1	80%	4	0%	0	100%	5	2.20
	Faculty	22%	6	63%	17	15%	4	100%	27	2.07
	Staff	0%	0	94%	17	6%	1	100%	18	1.94
	Other/Prefer not to answer	0%	0	100%	2	0%	0	100%	2	2.00
	Overall	13%	7	77%	40	10%	5	100%	52	2.04

The most current amount of **endowment** is \$65,200,000. As shown in the Table 31, a majority, 66%, rated the **endowment** target of \$80,000,000 as “about right.” The overall mean rating of the target was 1.84, “about right,” with all group means in the “about right” range, with the exception of those who did not identify their role and had a group mean 3.00, “too high.” The **endowment** stretch target of \$90,000,000 was also rated by a majority, 70%, as “about right.” The overall mean rating of the stretch target was 1.93, “about right,” again with all group means in the “about right” range, with the exception of those who did not identify their role and had a group mean of 3.00, “too high.” With just two respondents in this group, caution should be observed interpreting results for this respondent group.

**Table 31 - Goal 5 Metrics Targets and Stretch Targets Feedback by Role: Endowment**

If "Yes" to both "Would you like to provide feedback on the metrics for Goal 5?" and "Would you like to provide feedback on the targets and stretch targets for Goal 5?": Below are the most recent values for each metric for Goal 5 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 5 is appropriate?

Metric Targets	Role	Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Total endowment assets, Current = \$65.2M; Target = \$80M; Stretch Target = \$90M	Administrator	14%	1	71%	5	14%	1	100%	7	2.00
	Faculty	4%	1	57%	16	39%	11	100%	28	1.64
	Staff	5%	1	84%	16	11%	2	100%	19	1.95
	Other/Prefer not to answer	100%	2	0%	0	0%	0	100%	2	3.00
	Overall	9%	5	66%	37	25%	14	100%	56	1.84
	Role	Stretch Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	17%	1	67%	4	17%	1	100%	6	2.00
	Faculty	4%	1	71%	20	25%	7	100%	28	1.79
	Staff	11%	2	78%	14	11%	2	100%	18	2.00
	Other/Prefer not to answer	100%	2	0%	0	0%	0	100%	2	3.00
	Overall	11%	6	70%	38	19%	10	100%	54	1.93

The current amount of **unrestricted gift revenues** is \$387,316. As shown in the Table 32, a majority, 64%, rated the **unrestricted gift revenues** target of \$700,000 as “about right.” The overall mean rating of the target was 1.93, “about right,” with all group means in the “about right” range, with the exception of respondents who did not identify their role and had a group mean of 3.00, “too high.” The **unrestricted gift revenues** stretch target of \$1,000,000 was also rated by a majority, 68%, as “about right.” The overall mean rating of the stretch target was 2.09, “about right,” with all group means in the “about right” range, with the exception of those who did not identify their role and had a group mean of 3.00, “too high.” With just two respondents in this group, caution should be observed interpreting results for this group.

**Table 32 - Goal 5 Metrics Targets and Stretch Targets Feedback by Role: Unrestricted Gift Revenue**

If "Yes" to both "Would you like to provide feedback on the metrics for Goal 5?" and "Would you like to provide feedback on the targets and stretch targets for Goal 5?": Below are the most recent values for each metric for Goal 5 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 5 is appropriate?

Metric Targets	Role	Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Unrestricted gift revenues, Current = \$387,316; Target = \$700K; Stretch Target = \$1M	Administrator	0%	0	67%	4	33%	2	100%	6	1.67
	Faculty	7%	2	64%	18	29%	8	100%	28	1.79
	Staff	21%	4	68%	13	11%	2	100%	19	2.11
	Other/Prefer not to answer	100%	2	0%	0	0%	0	100%	2	3.00
	Overall	15%	8	64%	35	22%	12	100%	55	1.93
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count		
	Administrator	20%	1	80%	4	0%	0	100%	5	2.20
	Faculty	11%	3	75%	21	14%	4	100%	28	1.96
	Staff	28%	5	61%	11	11%	2	100%	18	2.17
	Other/Prefer not to answer	100%	2	0%	0	0%	0	100%	2	3.00
	Overall	21%	11	68%	36	11%	6	100%	53	2.09

The current **alumni giving rate** is 4.7%. As shown in Table 33, a majority, 57%, rated the **alumni giving rate** target of 13% as “about right.” The overall mean rating of the target was 1.83, “about right,” with all group means in the “about right” range, with the exception of respondents who did not provide their role and had a group mean of 3.00, “too high.” The **alumni giving rate** stretch target of 15% was also rated by a majority, 56%, as “about right.” The overall mean rating of the stretch target was 1.83, “about right,” with all group means in the “about right” range, with the exception of respondents who did not provide their role and had a group mean of 3.00, “too high.” With just two respondents in this group, caution should be observed interpreting results for this group.

Table 33 - Goal 5 Metrics Targets and Stretch Targets Feedback by Role: Alumni Giving Rate										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 5?" and "Would you like to provide feedback on the targets and stretch targets for Goal 5?": Below are the most recent values for each metric for Goal 5 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 5 is appropriate?										
Metric Targets	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Alumni giving rates, Current = 4.7%; Target = 13%; Stretch Target = 15%	Administrator	17%	1	50%	3	33%	2	100%	6	1.83
	Faculty	7%	2	67%	18	26%	7	100%	27	1.81
	Staff	11%	2	53%	10	37%	7	100%	19	1.74
	Other/Prefer not to answer	100%	2	0%	0	0%	0	100%	2	3.00
	Overall	13%	7	57%	31	30%	16	100%	54	1.83
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	20%	1	40%	2	40%	2	100%	5	1.80
	Faculty	7%	2	63%	17	30%	8	100%	27	1.78
	Staff	11%	2	56%	10	33%	6	100%	18	1.78
	Other/Prefer not to answer	100%	2	0%	0	0%	0	100%	2	3.00
	Overall	13%	7	56%	29	31%	16	100%	52	1.83

To summarize, the target and stretch target for **scholarship/grant dollars from University & Foundation** were rated overall and by all groups as “too low,” except for Administrators who rated the target as “about right” and those who did not provide their role who rated both the target and stretch target as “about right.” Note the 2025 target was met in Fall 2020. The target and stretch target for **debt ratio** were rated as “about right” overall and by all groups. Note the 2025 target was met in FY20.

Targets and stretch targets for **endowment, unrestricted gift revenues, and alumni giving rate** were rated overall and by all groups except one as “about right.” Those who did not provide their role rated targets and stretch targets for these three metrics as “too high.”

**Winthrop Goal 2: Continually enhance the quality of the Winthrop experience for all students by promoting a culture of innovation with an emphasis on global and community engagement.**

About 25% of the 304 respondents chose to give feedback on the appropriateness of the Winthrop Plan Goal 2 metrics. Of note, this is the lowest rate of response among the five Winthrop Plan Goal Metrics, indicating modest interest in providing feedback for the Goal 2 Metrics.

### ***Winthrop Plan Goal 2 Metrics***

Respondents were asked to rate each of the four metrics for Goal 2 on appropriateness as a measure of progress. Table 34 presents the ratings overall and by role. Results are presented in descending order with highest respondent overall ratings of combined “appropriate” and “somewhat appropriate” at the top of the table.

As shown in Table 34, respondents rated **high-impact practice participation** as the most appropriate metric, as 87% indicated it was at least a “somewhat appropriate” metric. The **NSSE Student-Faculty Interaction Indicator** had the 2nd highest rating of metric appropriateness, as 86% of respondents rated it as at least “somewhat appropriate.” The **NSSE Diversity Indicator** had the next highest rating of appropriateness, as 79% rated it as at least a “somewhat appropriate” metric. **Number of new and redesigned programs** was rated as at least “somewhat appropriate” by 76% of respondents.

The overall mean appropriateness for **high-impact practice participation** was 3.59, “appropriate,” with all group means in the “appropriate” range. The overall mean appropriateness for **NSSE Student-Faculty Interaction Indicator** was 3.45, “somewhat appropriate,” with all group means in the “somewhat appropriate” range, with the exception of Staff who had a group mean of 3.67, “appropriate.” The overall mean appropriateness for **NSSE Diversity Indicator** was 3.31, “somewhat appropriate,” with all group means in the “somewhat appropriate” range except Staff who had a group mean of 3.56, “appropriate.” Lastly, the overall mean appropriateness for **number of new and redesigned programs** was 3.07, “somewhat appropriate,” with all group means in the “somewhat appropriate” range.

Table 34 - Goal 2 Metrics Feedback by Role														
If "Yes" to "Would you like to provide feedback on the metrics for Goal 2?": Below are the metrics chosen to measure success for Goal 2. Do you believe each metric is appropriate as one of the indicators of success for Goal 2?														
Metric	Role	Appropriate (4)		Somewhat appropriate (3)		Somewhat inappropriate (2)		Inappropriate (1)		Don't know*		Overall		Mean*
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Percentage of undergraduate students who graduate with at least two high-impact practices (research, internship, etc.)	Administrator	56%	5	44%	4	0%	0	0%	0	0%	0	100%	9	3.56
	Faculty	68%	23	24%	8	3%	1	3%	1	3%	1	100%	34	3.61
	Staff	72%	21	7%	2	17%	5	0%	0	3%	1	100%	29	3.57
	Other/Prefer not to answer	50%	2	25%	1	0%	0	0%	0	25%	1	100%	4	3.67
	<b>Overall</b>	<b>67%</b>	<b>51</b>	<b>20%</b>	<b>15</b>	<b>8%</b>	<b>6</b>	<b>1%</b>	<b>1</b>	<b>4%</b>	<b>3</b>	<b>100%</b>	<b>76</b>	<b>3.59</b>
NSSE Student-Faculty Interaction Engagement Indicator	Administrator	44%	4	56%	5	0%	0	0%	0	0%	0	100%	9	3.44
	Faculty	47%	16	35%	12	6%	2	6%	2	6%	2	100%	34	3.31
	Staff	66%	19	24%	7	3%	1	0%	0	7%	2	100%	29	3.67
	Other/Prefer not to answer	25%	1	25%	1	25%	1	0%	0	25%	1	100%	4	3.00
	<b>Overall</b>	<b>53%</b>	<b>40</b>	<b>33%</b>	<b>25</b>	<b>5%</b>	<b>4</b>	<b>3%</b>	<b>2</b>	<b>7%</b>	<b>5</b>	<b>100%</b>	<b>76</b>	<b>3.45</b>
National Survey of Student Engagement (NSSE) Diversity Indicator	Administrator	44%	4	22%	2	33%	3	0%	0	0%	0	100%	9	3.11
	Faculty	44%	15	35%	12	3%	1	12%	4	6%	2	100%	34	3.19
	Staff	62%	18	24%	7	3%	1	3%	1	7%	2	100%	29	3.56
	Other/Prefer not to answer	25%	1	25%	1	25%	1	0%	0	25%	1	100%	4	3.00
	<b>Overall</b>	<b>50%</b>	<b>38</b>	<b>29%</b>	<b>22</b>	<b>8%</b>	<b>6</b>	<b>7%</b>	<b>5</b>	<b>7%</b>	<b>5</b>	<b>100%</b>	<b>76</b>	<b>3.31</b>
Number of new and redesigned programs	Administrator	56%	5	33%	3	11%	1	0%	0	0%	0	100%	9	3.44
	Faculty	21%	7	47%	16	21%	7	12%	4	0%	0	100%	34	2.76
	Staff	48%	14	34%	10	14%	4	0%	0	3%	1	100%	29	3.36
	Other/Prefer not to answer	0%	0	75%	3	25%	1	0%	0	0%	0	100%	4	2.75
	<b>Overall</b>	<b>34%</b>	<b>26</b>	<b>42%</b>	<b>32</b>	<b>17%</b>	<b>13</b>	<b>5%</b>	<b>4</b>	<b>1%</b>	<b>1</b>	<b>100%</b>	<b>76</b>	<b>3.07</b>
*"Don't know" excluded from calculation of mean														

To summarize mean ratings of appropriateness for Goal 2, **high-impact practice participation** was rated overall and by all groups as “appropriate.” **NSSE Student-Faculty Interaction** and **Diversity Indicators** were rated overall as “somewhat appropriate,” with all group means also in the “somewhat appropriate” range, except Staff who rated both as “appropriate.” **Number of new and redesigned programs** was rated overall and by all groups as “somewhat appropriate.”

### ***Winthrop Plan Goal 2 Metric 2025 Targets***

About 18% of the 304 respondents provided feedback on targets and stretch targets for the Winthrop Plan Goal 2 metrics. This was tied with Goal 5 in last place in percentage of respondents electing to give feedback on targets and stretch targets. Targets rated overall as “too high” will be discussed first, followed by those rated as “about right.” No Goal 2 targets or stretch targets were rated as “too low.”

The most recent **number of new and redesigned programs** is 11. As shown in Table 35, a majority, 52%, rated the **number of new and redesigned programs** target of 25 as “too high,” however, the overall mean rating of the target was 2.46, “about right.” Two groups, Administrators and Staff, had group means in the “about right” range, whereas Faculty and those who did not identify their role had group means in the “too high” range. The **number of new and redesigned programs** stretch target of 40 was also rated by a majority, 78%, of respondents as “too



high,” and the overall mean rating of the stretch target was 2.69, “too high” with all groups in the “too high” range, except Administrators who had a group mean of 2.43, “about right.”

Table 35 - Goal 2 Metrics Targets and Stretch Targets Feedback by Role: New and Redesigned Programs										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 2?" and "Would you like to provide feedback on the targets and stretch targets for Goal 2?": Below are the most recent values for each metric for Goal 2 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 2 is appropriate?										
Metric Targets	Role	Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Number of new and redesigned programs, Current = 11; Target = 25; Stretch Target = 40	Administrator	56%	5	33%	3	11%	1	100%	9	2.44
	Faculty	65%	15	35%	8	0%	0	100%	23	2.65
	Staff	32%	6	58%	11	11%	2	100%	19	2.21
	Other/Prefer not to answer	67%	2	33%	1	0%	0	100%	3	2.67
	Overall	52%	28	43%	23	6%	3	100%	54	2.46
	Role	Stretch Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	57%	4	29%	2	14%	1	100%	7	2.43
	Faculty	86%	19	9%	2	5%	1	100%	22	2.81
	Staff	71%	12	18%	3	12%	2	100%	17	2.58
	Other/Prefer not to answer	100%	3	0%	0	0%	0	100%	3	3.00
	Overall	78%	38	14%	7	8%	4	100%	49	2.69

The most recent **high-impact practice participation rate** is 69%, with the target of 84% rated by a majority, 54%, as “about right” as shown in Table 36. The overall mean rating of the target was 2.32, “about right,” with all groups in the “about right” range. Interestingly, the stretch target for **high-impact practice participation rate** of 89% was rated by an equal percentage, 47%, as “too high” as “about right,” thus, there is no clear overall majority opinion. The overall mean rating of the stretch target was 2.41, “about right” with all group means in the “about right” range.

<b>Table 36 - Goal 2 Metrics Targets and Stretch Targets Feedback by Role: High-impact Practices</b>										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 2?" and "Would you like to provide feedback on the targets and stretch targets for Goal 2?": Below are the most recent values for each metric for Goal 2 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 2 is appropriate?										
Metric Targets	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
Percentage of undergraduate students who graduate with at least two high-impact practices (research, internship, etc), Current =69%; Target = 84%; Stretch Target = 89%	Administrator	22%	2	78%	7	0%	0	100%	9	2.22
	Faculty	48%	12	48%	12	4%	1	100%	25	2.44
	Staff	37%	7	47%	9	16%	3	100%	19	2.21
	Other/Prefer not to answer	33%	1	67%	2	0%	0	100%	3	2.33
	<b>Overall</b>	<b>39%</b>	<b>22</b>	<b>54%</b>	<b>30</b>	<b>7%</b>	<b>4</b>	<b>100%</b>	<b>56</b>	<b>2.32</b>
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	29%	2	71%	5	0%	0	100%	7	2.29
	Faculty	54%	13	42%	10	4%	1	100%	24	2.48
	Staff	47%	8	41%	7	12%	2	100%	17	2.35
	Other/Prefer not to answer	33%	1	67%	2	0%	0	100%	3	2.33
	<b>Overall</b>	<b>47%</b>	<b>24</b>	<b>47%</b>	<b>24</b>	<b>6%</b>	<b>3</b>	<b>100%</b>	<b>51</b>	<b>2.41</b>

The targets and stretch targets for the remaining Goal 2 metrics were rated by a majority as “about right.” As shown in Table 37, the most recent **NSSE Diversity Indicator** was 78% and the target of 83% was rated by a majority, 82%, as “about right”. The overall mean rating of the target was 2.06, with all group means in the “about right” range. Likewise, the stretch target for **NSSE Diversity Indicator** of 88% was rated by a majority, 69%, as “about right.” The overall mean rating of the stretch target was 2.22, “about right,” with all group means also in the “about right” range.

Table 37 - Goal 2 Metrics Targets and Stretch Targets Feedback by Role: NSSE Diversity Indicator										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 2?" and "Would you like to provide feedback on the targets and stretch targets for Goal 2?": Below are the most recent values for each metric for Goal 2 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 2 is appropriate?										
Metric Targets	Role	Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
NSSE Diversity Indicator, Current = 78%; Target = 83%; Stretch Target = 88%	Administrator	11%	1	89%	8	0%	0	100%	9	2.11
	Faculty	15%	3	75%	15	10%	2	100%	20	2.05
	Staff	11%	2	83%	15	6%	1	100%	18	2.06
	Other/Prefer not to answer	0%	0	100%	3	0%	0	100%	3	2.00
	Overall	12%	6	82%	41	6%	3	100%	50	2.06
	Role	Stretch Target								Mean
		Too high (3)		About right (2)		Too low (1)		Overall		
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	29%	2	71%	5	0%	0	100%	7	2.29
	Faculty	32%	6	63%	12	5%	1	100%	19	2.28
	Staff	19%	3	75%	12	6%	1	100%	16	2.13
	Other/Prefer not to answer	33%	1	67%	2	0%	0	100%	3	2.33
		27%	12	69%	31	4%	2	100%	45	2.22

The most recent **NSSE Student-Faculty Interaction Indicator** was 46%, with the target of 52% rated by an overall majority, 80%, as “about right.” As shown in Table 38, the overall mean rating of the target was 1.80, “about right,” with all group means in the “about right” range. Similarly, the stretch target for **NSSE Student-Faculty Interaction Indicator** of 55% was rated by an overall majority, 70%, as “about right.” The overall mean rating of the stretch target was 1.83, “about right,” with all group means in the “about right” range, with the exception of respondents who did not identify their role and had a group mean of 2.67, “too high.” Caution should be used interpreting results for this group as only three respondents rated Goal 2 targets.

<b>Table 38 - Goal 2 Metrics Targets and Stretch Targets Feedback by Role: NSSE Student-Faculty Interaction Indicator</b>										
If "Yes" to both "Would you like to provide feedback on the metrics for Goal 2?" and "Would you like to provide feedback on the targets and stretch targets for Goal 2?": Below are the most recent values for each metric for Goal 2 as well as the 2025 target and stretch target values for each. Do you believe each target and stretch target value for Goal 2 is appropriate?										
Metric Targets	Role	Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
NSSE Student-Faculty Interaction Engagement Indicator, Current = 46%; Target = 52%; Stretch Target = 55%	Administrator	0%	0	56%	5	44%	4	100%	9	1.56
	Faculty	0%	0	86%	18	14%	3	100%	21	1.86
	Staff	0%	0	83%	15	17%	3	100%	18	1.83
	Other/Prefer not to answer	0%	0	100%	3	0%	0	100%	3	2.00
	<b>Overall</b>	<b>0%</b>	<b>0</b>	<b>80%</b>	<b>41</b>	<b>20%</b>	<b>10</b>	<b>100%</b>	<b>51</b>	<b>1.80</b>
	Role	Stretch Target								
		Too high (3)		About right (2)		Too low (1)		Overall		Mean
		Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	Frequency (within row)	Count	
	Administrator	0%	0	43%	3	57%	4	100%	7	1.43
	Faculty	5%	1	80%	16	15%	3	100%	20	1.95
	Staff	0%	0	75%	12	25%	4	100%	16	1.75
	Other/Prefer not to answer	67%	2	33%	1	0%	0	100%	3	2.67
	<b>Overall</b>	<b>7%</b>	<b>3</b>	<b>70%</b>	<b>32</b>	<b>24%</b>	<b>11</b>	<b>100%</b>	<b>46</b>	<b>1.83</b>

To summarize Goal 2 2025 mean ratings of targets, overall all targets were rated “about right” and all group means were in the “about right” range with one exception. Faculty rated the target for **new and redesigned programs** as “too high.”

To summarize Goal 2 2025 mean ratings of stretch targets, the stretch target for **new and redesigned programs** was rated as “too high” overall and by all groups, except Administrators who rated it as “about right.” The stretch target for **NSSE Student-Faculty Interaction Engagement Indicator** was rated overall and by all groups as “about right,” except by those who did not provide their role and rated the stretch target as “too high.” Finally, stretch targets for **high-impact practice participation rate** and **NSSE Diversity Indicator** were rated as “about right” overall and by all groups.

### Open-ended Survey Questions - What’s Working Well and What Needs Improvement

Respondents were given the opportunity to provide feedback in the form of open-ended responses to questions regarding each Goal and what they believed to be working well overall and what they felt needed to be improved overall. Qualitative analysis was performed to identify common topics and themes within the thoughtful and thorough responses, which are discussed below.

### ***Successful Aspects of the Winthrop Plan***

There were 48 responses, which mentioned perceived successful aspects of the Winthrop Plan, to the question, “In your opinion, what aspects of the Winthrop Plan or planning process worked well and need no change at this time?” Over 70% of those responses mention specific Winthrop Plan goals or metrics, while the remaining responses addressed either the general plan or the process of formulating and initially implementing the plan. Each response does not exclusively relate to one topic or theme thus the percentages presented in this section do not add up to 100%. Aspects will be discussed in decreasing order by frequency of mention.

#### **Feedback on successful aspects specific to Winthrop Plan Goal 1: Support inclusive excellence by expanding our impact on students and our communities through enrollment growth and increases in retention and graduation rates.**

Goal 1 was the most frequently mentioned successful aspect of the Winthrop Plan. Twenty-three percent of the 48 responses mentioning successful aspects of the Winthrop Plan commented on Goal 1 or metrics within Goal 1.

**Percentage of students who are diverse** was the most commonly mentioned successful aspect within Goal 1.

Below are examples of such comments.

- “Bringing on a diverse student body has been successful and is one of Winthrop's greatest strengths....”
- “Commitment to diversity in faculty/staff and students is good. Clearly our goals were too low.”

**Retention** was the second most commonly mentioned successful aspect within Goal 1. Below is an example of such a comment.

- “Thanks to the faculty's hard work, as well as many supporting staff members, we've continued to provide excellent experiences for our students, even during these impossible times. Even without proper investment in technology, faculty scrambled to innovate and retain students...”

Others comments mentioned Goal 1 overall, without citing a specific metric within Goal 1, as in the comment below.

- “Goal 1 seems to be working well, no change needed.”

#### **Feedback on successful aspects specific to Winthrop Plan Goal 3: Attract and retain high quality and diverse faculty, staff and administrators.**

Twenty-one percent of the 48 responses mentioning successful aspects of the Winthrop Plan commented on Goal 3, making it the 2<sup>nd</sup> most frequently mentioned successful aspect of the Winthrop Plan. Notably, every comment

relating to Goal 3 metrics touted **percentage of faculty/managerial staff who are diverse** as a successful aspect of the Winthrop Plan. Below are examples of such comments.

- "We've done a good job recruiting diverse faculty. We need to work on retaining them..."
- "I like the focus on hiring diversity! I think we've made good strides and should keep this up."
- "Worked well: recruitment/ hiring of diverse employees."

#### **Feedback on successful aspects of Winthrop Plan in General**

Twenty-one percent of the 48 responses mentioning successful aspects of the Winthrop Plan commented generally on the Winthrop Plan, without mentioning any specific goal or metric, making this tied for 2<sup>nd</sup> as the most frequently mentioned successful aspect of the Winthrop Plan. Below are examples of such comments.

- "I believe all Winthrop Plan goals have merit and progress has been made toward each - and continued efforts for progress should remain. Each of the five goals and targets could be refreshed, provided five years have passed."
- "I think we need to keep up what we are doing and I totally pleased with how we did in 2021."
- "Limited number of goals/objectives... Reasonable number of metrics for each goal..."

#### **Feedback on successful aspects specific to Winthrop Plan Goal 2: Continually enhance the quality of the Winthrop experience for all students by promoting a culture of innovation with an emphasis on global and community engagement.**

Seventeen percent of the 48 responses mentioning successful aspects of the Winthrop Plan commented on Goal 2 or metrics within Goal 2, making it the 3<sup>rd</sup> most frequently mentioned successful aspect of the Winthrop Plan. Most of the comments relating to Goal 2 tout the **number of new and redesigned programs** as a successful aspect of the Winthrop Plan. It was the only metric within Goal 2 that was mentioned. Below are example comments.

- "Academic Program Mix and retention efforts working well. Need clarification on innovation and program redesign as percent of effort."
- "Academic program mix -- in part, as we continue to reduce budget (and "do more with less") there seems to be no re-investments. Thus, ultimately, the fact that several changes occurred in academics despite this lack of financial support is a good thing."

A few of the responses mentioned Goal 2 generally without naming a specific metric within Goal 2. Below is an example of such a comment.

- "I think there has been success in promoting a culture of innovation in a lot of ways."

### **Feedback on successful aspects specific to Winthrop Plan Formation or Initial Implementation**

Thirteen percent of the 48 responses mentioning successful aspects of the Winthrop Plan commented on the Winthrop Plan formation or initial implementation, making this tied for 4<sup>th</sup> as the most frequently mentioned successful aspect of the Winthrop Plan. Below are examples of such comments.

- “The focus groups did pull in the people in the trenches which really are the people that do the work and know the ins and outs of how to be able to make improvements.”
- “Having a mix of staff, students, and faculty on the working groups. I liked that there were new people in the groups. Some were even group leaders.”
- “The Winthrop Plan is a good first attempt at strategic planning across an enterprise. From my understanding, there were working groups that put together the current plan and others that are working to ensure that metrics are met. This is a very commendable effort.”

Goal 4: "Provide facilities, technology, and programs that support Winthrop students and the overall Winthrop experience" was mentioned by just 2% (one person) of the 48 responses commenting on successful aspects of the Winthrop Plan. Goal 5: "Ensure financial stability and sustainability" was mentioned by just 6% (three people).

### ***Aspects of the Winthrop Plan That Need Improvement***

Respondents were asked, “In your opinion, what aspects of the Winthrop Plan or planning process could possibly be improved?” Additionally, at the end of every set of survey questions regarding each Goal, respondents were asked, “If you would like to provide any comments regarding the metrics or targets of Goal X, please do so below.” Though not specifically solicited in the question wording, responses to this question naturally settled on comments and/or suggestions regarding aspects of each Goal that needed improvement. As a result, responses to these six questions were combined for qualitative analysis on aspects of the Winthrop Plan that need improvement. There were 237 responses with viable content for analysis mentioning aspects of Winthrop Plan that needed improvement. Often comments related to more than one topic or theme leading to percentages again not adding up to 100%. Topics are presented in decreasing order of frequency.

### **Feedback on aspects of the Winthrop Plan that need improvement specific to Winthrop Plan Goal 3: Attract and retain high quality and diverse faculty, staff and administrators.**

The most popular topic for comments on aspects of the Winthrop Plan that need improvement concerned Goal 3 or metrics and/or targets within Goal 3. Thirty-seven percent of the comments pertained to Goal 3. By far, the most comments related to the metric **percentage of full-time employees with salaries at or above the median**, with comments focusing on salaries perceived as being too low. Below are characteristic comment examples.

- “The third part part (sic) of the plan, to attract and retain employees, has been a colossal failure. We've struggled to hire the best talent or attract diverse candidates because our pay is so low and our workload so intense. I've been on numerous search committees and watched us fail to get the top talented, diverse candidates because of this issue. We'll also surely lose many of our best because nothing has been done about pay inequities and stagnation. There hasn't even been transparency, including lack of transparency about the salary studies. Many of my closest colleagues are seeking other jobs, and Winthrop's only saving grace is a poor job market, but soon that will shift and Winthrop will be struggling to retain so many of their best faculty members who saved this university and supported our students during the toughest time. If Winthrop doesn't get to work very seriously on this part of the plan immediately, the future of this institution looks dismal.”
- “...The idea that merely 20% of the personnel need to be paid at "median" levels is laughable. Furthermore, not a single person should be paid above median before all are paid median level wages/salaries....”
- “Since 2016, and very little has been done to actually increase staff salaries. The compensation study is always referenced, but what has been done with this data? Average pay isn't an unreasonable ask.”
- “...there are many underpaid staff here that where many hats, I know the plan mentions..."3.2 Develop and implement a long-term competitive compensation plan" but I think a more concrete timeline on this would comfort many, especially after this hard year and being furloughed.”

Several respondents expressed that prioritization of certain groups should occur in any effort to address employee compensation, as example comments below indicate.

- “I feel we can continue to recruit diverse faculty but we need to KEEP them and not overburden with diversity work. Pay them at least at the median....”
- “Staff have not received raises in over 10 years. While upper administration has.”
- “Goal 3 needs to be improved. If we truly want to attract and retain diverse faculty we have to address the disparity in salaries. Qualified faculty members will not want to come to a culture of not valuing senior faculty members. Large discrepancies in salaries will deter faculty members from coming as well as staying here at Winthrop. Diverse faculty members are responsible for so much more and when they feel undervalued, underappreciated, and are under paid they will leave. We have to be intentional about showing our appreciation with more than just words and praise but actually paying them equivalent to their counterparts fulfilling the same exact roles. This is a wide-spread problem here.”



Several comments further point out that low pay, coupled with increased workloads due to furloughs, vacant positions and general increase in job responsibilities, has been a particular problem in recent years, as exemplars below illustrate.

- "SUPPORT STAFF. Especially in the last year, too many positions have not been filled and great staff are leaving because they are not appreciated or compensated. Staff are doing multiple positions with no increase in pay. Its (sic) unethical and Winthrop will continue to lose good staff...."
- "Staff members are underpaid and valuable staff members are now leaving due to Winthrop's ability to address issues, pay, and morale. Remaining staff are given additional duties with no pay."
- "Staff salaries are so low. Couple this with the shortage of staff, hiring freezes, and staff doing more and more, and you have a huge staff morale problem. Winthrop is losing good people because of this and it's terrible!"

As the comment directly above expressed, compensation/workload and morale can be related, which allows a segue into the next most frequently mentioned metric within Goal 3, **satisfaction of faculty, staff, and administrators based on one or more rating systems**. Below are a few example comments related to employee satisfaction.

- "... Morale is terrible. And admin unresponsive. Doing the university's yard work and being asked to leave through VSP is not helpful. Pay attention to us."
- "The compensation study was supposed to be part of Goal 3. And yet the results of that study were top-secret. The faculty have a right to know the data and yet the Provost won't share it. Why not? Paying for a huge study, waiting months for results, seeing no data, and hearing no action plan for that metric destroyed faculty morale..."
- "...Do we really expect only 60-65% of us to express satisfaction? Embarrassing."

Importantly, many respondents astutely convey **satisfaction of faculty, staff, and administrators based on one or more rating systems** is likely necessary to the success of the Winthrop Plan and the institution itself as shown in the comments below.

- "Strategic planning should be a Board-driven objective as they are tasked with University governance. As such, many of the metrics seem to be driven by a division, not from an enterprise point of view. For example, is it possible to attract and retain students, grow new programs and accept that 1 out of every 3 employees is dissatisfied?"
- "Low morale can't help but affect how well staff is helping and supporting our students. Students know and feel it."

- “I would like to see a goal of improving morale among faculty, staff, students, and administrators at Winthrop. There are plenty of data within organizational psychology literature about how to measure success in this area and implement strategies to improve morale. This is fundamental to the success of all other current goals within the Winthrop Plan.”

About a quarter of the comments related to **satisfaction of faculty, staff, and administrators based on one or more rating systems** express confusion as to how it is measured or how it relates to other satisfaction study results, such as the Staff Assembly Spring Staff Survey conducted in February 2021. Below are example comments.

- “I would like to know what rating systems were used to measure employee satisfaction. Staff Conference recently published results of a satisfaction/morale survey that suggests lower satisfaction.”
- “The rating system for faculty, staff, administrator satisfaction needs to be listed and should be more than one as that can be skewed easily.”
- “The satisfaction of faculty/staff at 61% currently would seem to conflict with other surveys recently conducted...”

The final Goal 3 metric, **percentage of faculty/managerial staff who are diverse**, was mentioned frequently in the previous section containing feedback on aspects of the Winthrop Plan that were successful, however, this metric was also mentioned quite a bit in the responses addressing aspects that need improvement. Respondents expressed that diversity as defined in the plan in and of itself is not enough. As shown in comments below, inclusion of those diverse employees is perceived as essential.

- “I'd like to see ways to improve campus culture and a commitment not only to diversity in terms of numbers of diverse students and faculty/staff, but in terms of also equity and inclusivity, initiatives and efforts that support diverse populations and amplify their voices and experiences.”
- “We have somewhat improved with the diversity on campus (students, faculty and staff) but we can continue to work on that as well as the INCLUSION aspect. There are some great people on campus doing good things. They may not be well known in the academic circles on campus or hold a high position but they deserve to be at leadership tables.”

Further though, diversity, as defined in the plan, has met targets overall, perhaps this is not true in all areas. Below are example comments.

- “Attracting and retaining diverse faculty and staff members could be improved. We pride ourselves on diversity but lack the representation in our offices to emphasize this...”

- “I feel all departments need a deeper look. There are some departments that have made a great effort to bring in diverse new hires and some that have made little to no change.”

**Feedback on aspects of the Winthrop Plan that need improvement specific to Winthrop Plan Goal 4: Provide facilities, technology, and programs that support Winthrop students and the overall Winthrop experience.**

The 2<sup>nd</sup> most popular topic for comments on aspects of the Winthrop Plan that need improvement concerned Goal 4 or metrics and/or targets within Goal 4. Twenty-two percent of the comments pertained to Goal 4. By far, the most comments related to the **expenditures on facilities metric**. Below are characteristic examples.

- “We are WAY BEHIND on facilities. Burns is losing massive amounts of money while shut down. Toxic buildings (mold/leaks/lead paint) are unfair working environments. Some of the students end up sitting in broken chairs, with poor lighting, and toxic environments from 8:30am to 10:00pm. How is this okay?”
- “Also, facilities and technologies are outdated. How can you expect to retain high quality employees when the technology is not great and they get stuck in leaky buildings with bugs, mold and other problems... (sic) But something needs to happen. I am almost embarrassed to show friends and family the inside of buildings where I work.”
- “Facilities and grounds are deteriorating. Some classrooms are stuck in 1970 with yard-sale furniture. Facilities and classrooms are sad and not worth the tuition money paid.”
- “The poor state of our facilities is both unhealthy and holding us back. Many high schools are in better shape than we are. It's unfair to demand students and teachers work in toxic/unhealthy environs.”
- “... Students (including my own college-age student) tour other campuses and visit residence halls...our residence halls just can't compare. This is a huge selling factor for other campuses.”

The Goal 4 metric, **number of online/hybrid degree programs**, was the topic of a great deal of comments. After the pandemic year of teaching online, a fresh perspective on this matter was shared regarding online and/or hybrid course offerings and the resources available to support them. While the Goal 4 metric is number of online/hybrid programs and not number of online/hybrid courses, comments mentioning both topics are shared to bring to light valuable current thinking regarding online/hybrid instruction and the resources available to support it. Below are representative comments.

- “Look also at online offerings that are not a part of degree programs to give students more flexibility. Provide WOOL with more resources to review and support revisions for online courses, as needed.”
- “If there is emphasis on adding online/hybrid degree programs there needs to be an emphasis also on allowing staff to work hybrid to help support such programs that create unique office hours and needs”

- “I find it curious: 5 years ago Winthrop was VERY interested in broadening its reach to student by implementing online instruction; very few faculty were interested because they had no confidence in that modality. Now, with CoVIDs (sic), ALL faculty have been forced into online instruction; it was a rough transition, but faculty have found success, students in 'remote' locations - other countries or continents - have been reached that otherwise would not have been. But now, coming out of CoViD (sic) restrictions, online offerings have been intentionally and deliberately (sic) for the coming semesters. I find that 'curious' and contradictory.”
- “we were just forced to go back to 2019 levels of in-person! what kind of school are we? There's a fundamental disconnect between who we are, what our students want, and the direction we're going”

As the immediately preceding comment illustrates, the topic of institutional mission and identity creeps into some responses about **number of online/hybrid degree programs**. Although most responses regarding the metric convey the number should increase, a good number are ambivalent in their opinion on whether the number should increase as shown in comments below.

- “we don't have a clear identity and this has cascading effects. Are we an online or an in-person institution?”
- “The whole thing needs to be retooled in light of how the world has changed since Covid. Students and employees want a hybrid approach to education, however, perhaps what would make us stand out is to go back to the basics of what a bricks and mortar liberal arts experience in a residential setting should be. Can we revive/repurpose the "academy" in a way that gives us a competitive edge? That may mean focusing on a few things we do well instead of trying to be all things to all people.”
- “Do studies show that online programs work well for the students? I hear more complaints about online classes- way more work than face-to-face, without the support from faculty that you have when classes meet in person. It doesn't sound like a good plan at all.”
- “Online/hybrid degree programs should be an appropriate part of our overall mission. I realize that they serve a purpose, but those are limited to particular fields.”

Wisely, some respondents' comments illustrate the interdependent nature of some metrics as they suggested enrollment and or retention (Goal 1 metrics) could be improved by shifting delivery methods as seen in comments below.

- “Retention & recruitment may be easier to accomplish with online programs for undergrads.”
- “Let's start thinking strategically while the boat is moving in the direction of on-line and hybrid learning options to increase our offerings in various modalities. \*\*\*This is the time.\*\*\* We lose momentum is we

don't move on those now. Even fall semester we will have a tendency to want to fall back into the old normal. The campus of the future doesn't look like what we have today and the sooner we get on board with that the better poised we will be when enrollments necessitate these changes. Students have acquired an independence they don't want to give up. Hybrid options (within class, within programs) should be discussed."

Finally, several responses pertained to the Goal 4 metric, **number of classrooms upgraded with technology**, most noting confusion about how it is defined, as shown in example comments below.

- "... Terms like "upgraded technology" are not easy to quantify and can be confusing."
- "# classrooms w/upgraded tech: vague: what does 'upgraded' mean?"
- "...Clarify with something like "Number [or preferably, percentage] of classrooms with technology appropriate to the subject taught in it"

A few respondents commented on this Goal's metric by stating investment is needed in technology, not just in the classroom.

- "In many cases, such as classroom technology, the target values do not easily reflect the overall state of the campus."
- "Tech infrastructure needs investment. Upgrading podiums does nothing to move this needle. Students care more about their WiFi, online/hybrid options, printing, computer access and IT support staff."
- "Shouldn't have to use personal cell phones to stream in-person classes when students are out. RIDICULOUS."

**Feedback on aspects of the Winthrop Plan that need improvement specific to Winthrop Plan Goal 1: Support inclusive excellence by expanding our impact on students and our communities through enrollment growth and increases in retention and graduation rates.**

The 3<sup>rd</sup> most popular topic for comments on aspects of the Winthrop Plan that need improvement concerned Goal 1. Fifteen percent of the comments pertained to Goal 1. By far, the most comments related to the **enrollment** metric with comments focusing on suggestions to increase enrollment through marketing and branding. Below are example comments.

- "Marketing. We do not have a strong marketing program to recruit local or national students. I live in Charlotte and many people are not even aware of what Winthrop is."
- "I note "marketing." I work with both undergrad and grad programs, and it seems to me graduate program marketing is virtually non-existent..."

- “Enrollment efforts: In 2020 we had the highest number of new student applications in years, yet our actual enrollment came in at or below where it had been the previous couple of years. We need to work on the image and reputation of the University if you want to increase enrollment.”
- “We are falling in short in the vision for what Winthrop will look like for academic delivery in 10 years. That should be the priority and then build the marketing strategy from there.”

Another often suggested strategy to increase enrollment is strategic recruiting, as comments below express.

- “...invest in recruiting greater Charlotte and our local high schools.”
- “Non-traditional/transfer student recruitment”
- “I think that the university could allot more resources for marketing and not put so much pressure on faculty for student recruitment.”

### **Feedback on aspects of the Winthrop Plan that need improvement specific to the Winthrop Plan Planning Process**

The 4<sup>th</sup> most popular topic for comments on aspects of the Winthrop Plan that need improvement was the planning process itself. Fourteen percent of the comments pertained to the planning process. The most commonly expressed need for improvement was execution and follow-through with the Winthrop Plan. Below are example comments.

- “From my participation and witness, many “ACTION” groups lacked actual actions beyond meeting and discussing.”
- “The plans establish a clear vision for Winthrop's future, and one which would sustain us well into the future while maintaining our quality and values. However, these plans are meaningless when there are not transparent and measurable action steps to achieve them. Many of these goals - and even some that have met their targets or stretch targets - are products of happenstance, not of planned and executed action plans. Winthrop needs to get beyond “analysis paralysis” and set out steps for each goal that can be measured (and adjusted if not working).”
- “The implementation has been more of a let's do what we do and see how it supports the plan rather than strategic actions. The groups that were to lead implementation were poorly executed.”

Several respondents noted that execution and follow-through could be improved through resources specifically directed to advancing the Winthrop Plan metrics, as the comments below express.

- “Financial resources need to be prioritized to align with Winthrop's overall priorities. It became apparent that there would not be sufficient finances to support the metrics pretty quickly. This is frustrating to

those responsible for carrying out tasks associated with meeting the plan and to employees who have been provided specific expectations that are unmet because of finances. To employees it waters down the entire strategic planning process - it seems to be just words and no action.”

- “Develop a new budget model for the university that is more transparent and more clearly aligns with institutional goals.”
- “I feel like it was put into place to check a box and not to make a real difference. There weren’t enough resources dedicated to change to make a real difference.”

Many comments called for improved engagement and communication regarding the Winthrop Plan, as shown in example comments below.

- “... all divisions should understand how they contribute to the overall mission. The strategic plan allows each division, and down to each department, to know how they are to contribute, relevant metrics, KPI's and provide continual relevant feedback. How do events, marketing, athletics, student organizations fit well into our current plan?”
- “Communication! More of us can help achieve these goals if we get updates on where we are, which goals we are meeting, and which are falling behind.”
- “Have not been involved in any of the planning. I work in facilities maintenance. And we are not involved in these type of activates (sic).”

Finally, respondents expressed a need for targeted engagement of new people in the Winthrop Plan Planning process as shown in comments below.

- “There has to be a more diverse population of faculty (sic) and staff at the discussion table for these goals and plans. It seems to be the same people over and over again with little to no inclusion of newer employees. They bring fresh insight and experience that this institution needs to get out of its own way to improve.”
- “... I wasn't invited to participate in any working or action groups and don't know many people who were. It seems like the people who were chosen...were the same people who were tapped for everything else. Broadening the selection of people on groups may increase the number of ideas, increase the campus buy-in, and increase the number of people who can help get the target achieved.”
- “To keep faculty and staff bought in and willing to continue to work through these type of plans there is needs to be dialogue and reporting both ways not just up with no information and discussions coming

down. Otherwise you have people who have sat on committee after committee talking about the same things and same ideas for years see no difference start to give up.”

**Feedback on aspects of the Winthrop Plan that need improvement specific to Winthrop Plan Goal 2:  
Continually enhance the quality of the Winthrop experience for all students by promoting a culture of innovation with an emphasis on global and community engagement.**

Eleven percent of comments regarding aspects of the Winthrop Plan that need improvement pertained to Goal 2. This was the 5<sup>th</sup> most popular topic of comments and suggestions. By far, the most commonly mentioned aspect of Goal 2 metrics was **high-impact practices**. Some respondents convey either a lack of understanding that the NSSE **high-impact practice** indicator encompasses self-reported participation in two or more of the following: learning community, service-learning, work with a faculty member on research, study abroad, culminating senior experience, internship or field experience (see Appendix A for full definition), or a preference for direct measures of **high-impact practices**, as seen in the comments below.

- “The NSSE metrics are not robust indicators in this area. Need direct indicators.”
- “... Also need to identify a few more direct metrics rather than indirect metrics for goal 2.”
- “study abroad and service learning would be appropriate metrics”
- “There are no metrics for this goal: Enrich our academic program mix by developing new and innovative programs... This goal does not cover other programs such as internships. Co-ops?”

Several respondents also expressed **high-impact practices** require more support to achieve targets, as noted in the comments below.

- “Some of these targets are too high with the current levels of support. You can't expect more research, internships, programs etc. without funding them AND the faculty/staff who actually do them.”
- “Give faculty load credit for high-impact practices...”
- “I strongly support high impact practices but they are currently undersupported and more threatened by increasing class caps.”

Several respondents mentioned another Goal 2 metric in their suggestions to improve, **number of new and redesigned programs**. Most commonly, they expressed general support for the metric, but there was confusion about how often it should be done and how metrics are defined and measured. Below are examples of such comments.

- “Program redesign needs to ramp up quickly. All programs could stand a revamp, and we may need some kind of schedule that would require some degree of change every x years.”



- "... ALL programs need regular reviews for possible revision/elimination."
- "Need clarification on what would count as "redefined.""
- "Program" can be defined in many ways. As an employee, I would want clarification on what Winthrop University considers as a program related to this Winthrop Goal. What are the current 11 programs?"

**Feedback on aspects of the Winthrop Plan that need improvement specific to Winthrop Plan Goal 5:  
Ensure financial stability and sustainability.**

Ten percent of the comments regarding aspects of the Winthrop Plan that need improvement pertained to Goal 5. Remarkably, most comments and suggestions relating to Goal 5 did not focus to any metric, instead tying Winthrop's cost of attendance to long-term financial stability and sustainability. Respondents expressed several metrics, namely enrollment (Goal 1) and retention (Goal 1) are affected when cost is high and financial aid is low. Below are characteristic examples of such comments.

- "The cost of school is the main issue we have with new students/retention. There has to be a better way to channel funds."
- "... the amount dedicated to scholarships has declined. Our students are struggling more than ever. We need to find a way to put money back into scholarships...which should help with enrollment as well."
- "We need to may sure the students that are accepted can pay for their education. It's not just enrollment if they cannot afford to stay."

Several respondents suggest focusing not only on larger donations, but also on smaller donations, especially from alumni, in order to improve financial stability and sustainability, as the comments below illustrate.

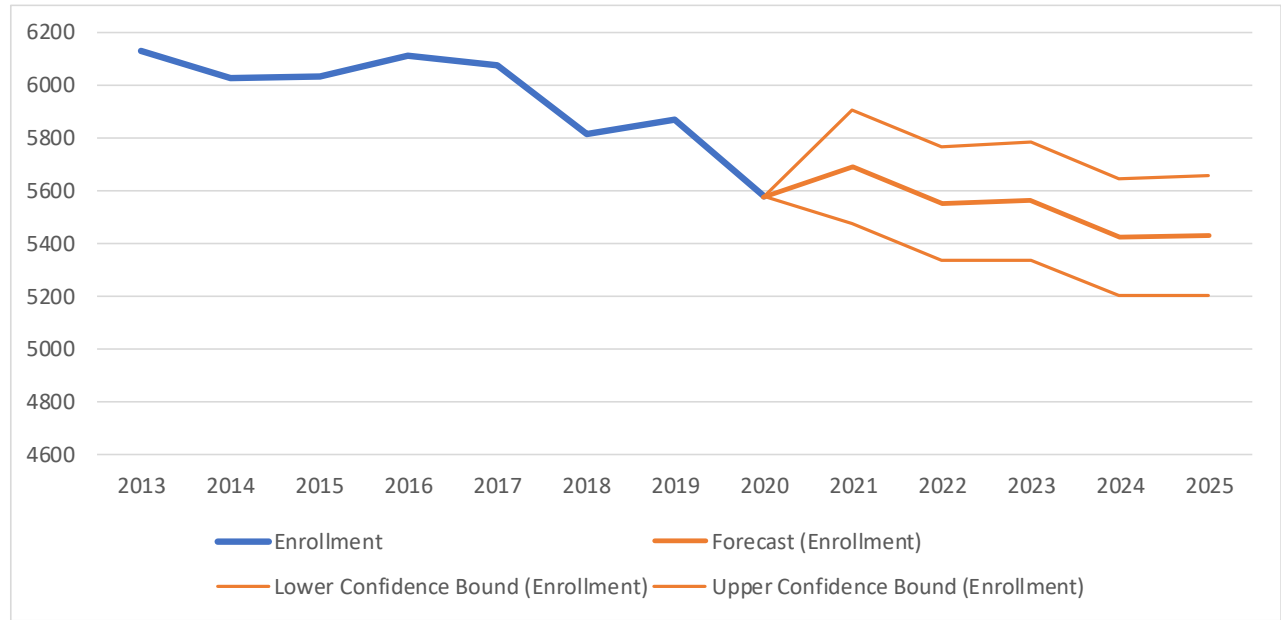
- "Goal 5 needs the most work. Far too little value has been placed on the potential of individual gifts in small amounts, sometimes targeted to specific projects and/or fundraising goals. As an institution with a high number of teachers as alums, smaller gifts are what we need to solicit publicly. Emphasis on estate gifts and the like makes people such as teachers feel that their gifts won't make a difference and may not even be wanted. We have to change that image to save ourselves."
- "Incentivize giving with YOUNG alumni. Give us the opportunity to get something out of our donations. We can't always give much, but \$5-\$100 is possible for many of us."
- "There is far too little emphasis on the power of small, individual contributions from alums, general public, parents, etc."

#### **Appendix 4 – Forecasts for Winthrop Plan Metrics Through 2025**

Using Excel's Forecast capabilities, AAAS used historical data from 2012 through 2020 to predict targets and stretch targets through 2025. This analysis is not meant to set the institutional targets, but only to inform discussions on the expected range of the metrics given most recent history. In the tables and charts below, the forecast is the predicted value with 95% confidence, thus the value will fall within the given lower and upper confidence bound values. No forecast was possible for **satisfaction of faculty, staff and administrators** because data were not collected across enough years for reliable prediction.

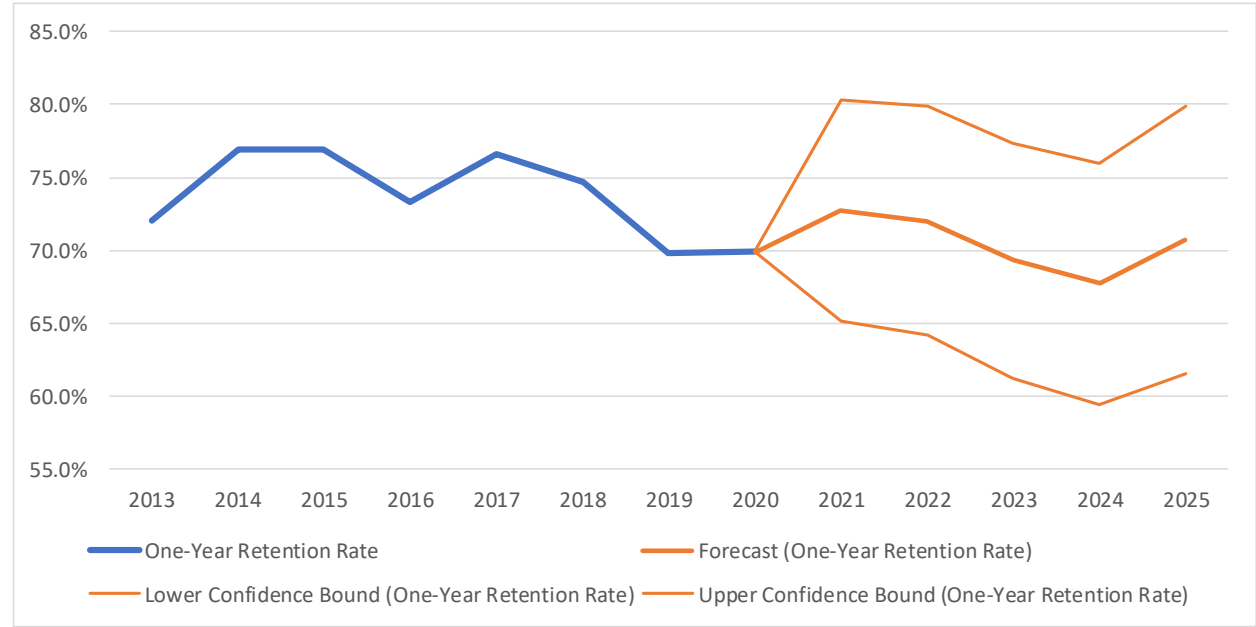
Goal 1: Enrollment Forecast in Table 39 and Figure 1

Year	Enrollment	Forecast (Enrollment)	Lower Confidence Bound (Enrollment)	Upper Confidence Bound (Enrollment)
2013	6130			
2014	6024			
2015	6031			
2016	6109			
2017	6073			
2018	5813			
2019	5865			
2020	5576	5576	5576	5576
2021		5688	5473	5902
2022		5550	5336	5765
2023		5559	5338	5780
2024		5422	5201	5643
2025		5431	5203	5659



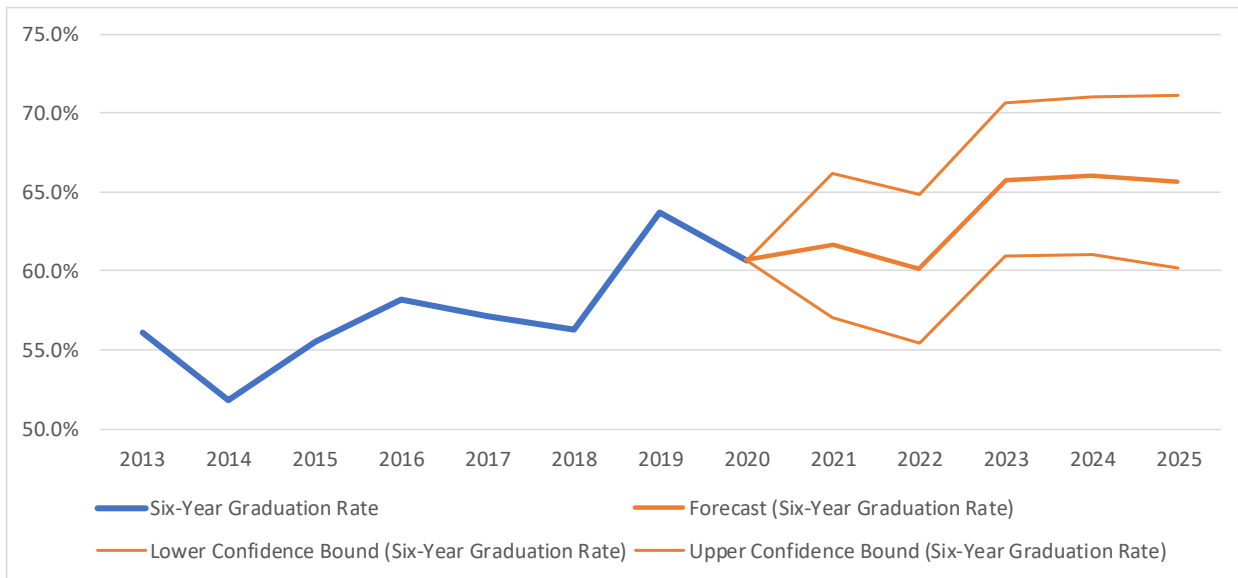
Goal 1: Retention Forecast in Table 40 and Figure 2

Year	One-Year Retention Rate	Forecast (One-Year Retention Rate)	Lower Confidence Bound (One-Year Retention Rate)	Upper Confidence Bound (One-Year Retention Rate)
2013	72.0%			
2014	76.9%			
2015	76.9%			
2016	73.3%			
2017	76.6%			
2018	74.7%			
2019	69.8%			
2020	69.9%	69.9%	69.9%	69.9%
2021		72.7%	65.1%	80.3%
2022		72.0%	64.2%	79.8%
2023		69.3%	61.3%	77.4%
2024		67.7%	59.4%	76.0%
2025		70.7%	61.6%	79.8%



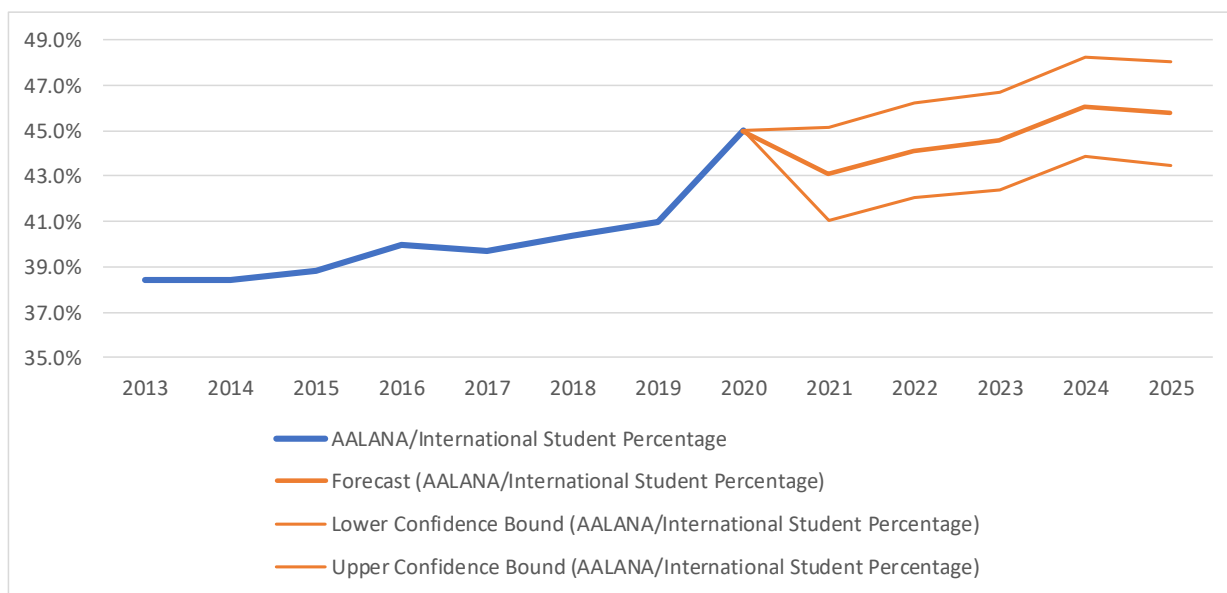
### Goal 1: Graduation Rate Forecast in Table 41 and Figure 3

Year	Six-Year Graduation Rate	Forecast (Six-Year Graduation Rate)	Lower Confidence Bound (Six-Year Graduation Rate)	Upper Confidence Bound (Six-Year Graduation Rate)
2013	56.1%			
2014	51.8%			
2015	55.5%			
2016	58.2%			
2017	57.1%			
2018	56.3%			
2019	63.7%			
2020	60.7%	60.7%	60.7%	60.7%
2021		61.6%	57.1%	66.2%
2022		60.1%	55.4%	64.8%
2023		65.8%	60.9%	70.6%
2024		66.0%	61.0%	71.0%
2025		65.7%	60.2%	71.2%



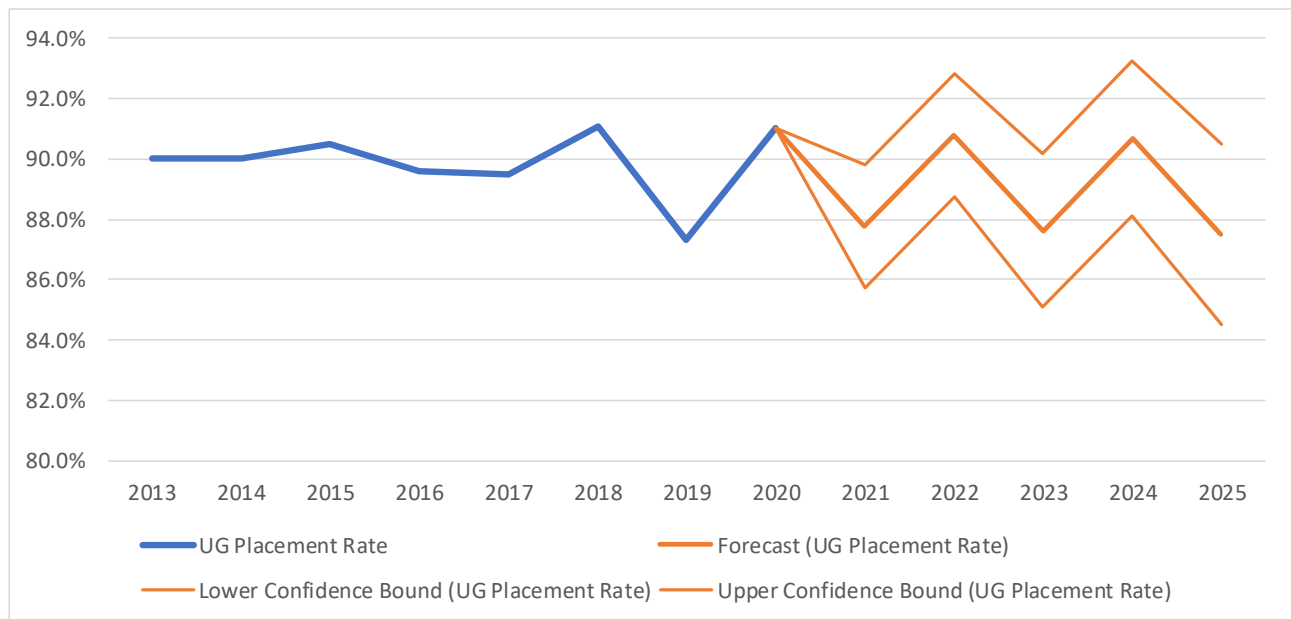
**Goal 1: Percent of Students Who are Diverse Forecast in Table 42 and Figure 4**

Year	AALANA/International Student Percentage	Forecast (AALANA/International Student Percentage)	Lower Confidence Bound (AALANA/International Student Percentage)	Upper Confidence Bound (AALANA/International Student Percentage)
2013	38.4%			
2014	38.4%			
2015	38.8%			
2016	40.0%			
2017	39.7%			
2018	40.4%			
2019	41.0%			
2020	45.0%	45.0%	45.0%	45.0%
2021		43.1%	41.1%	45.1%
2022		44.1%	42.0%	46.2%
2023		44.5%	42.4%	46.7%
2024		46.1%	43.8%	48.3%
2025		45.8%	43.5%	48.0%



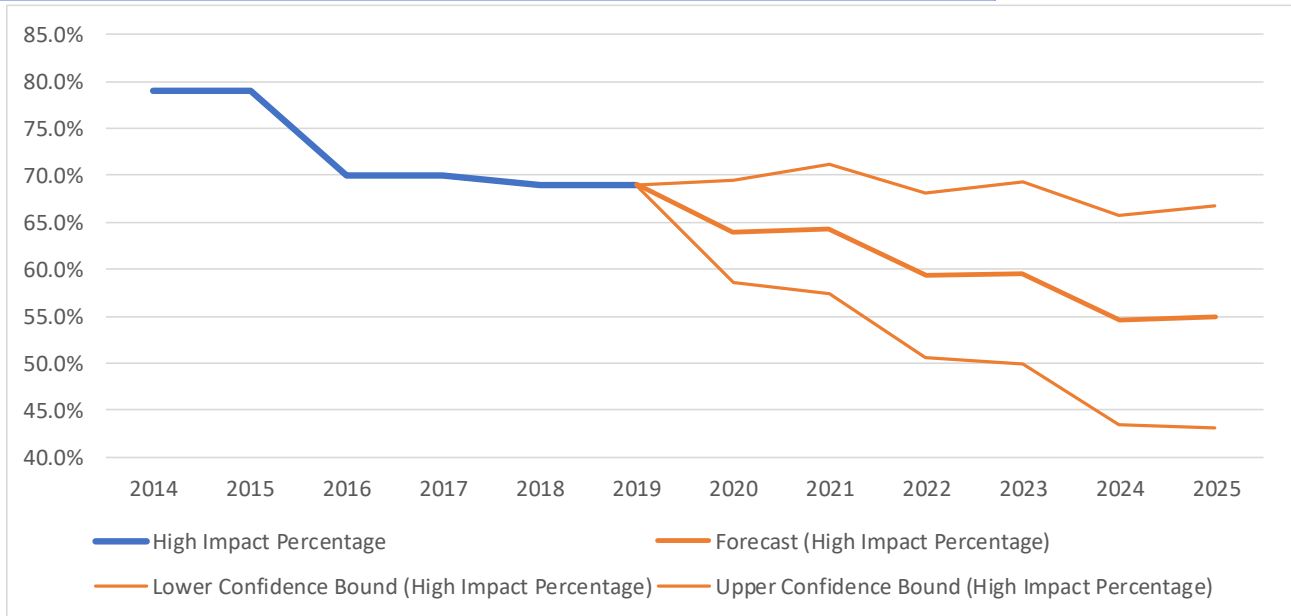
**Goal 1: Undergraduate Placement Rate Forecast in Table 43 and Figure 5**

Year	UG Placement Rate	Forecast (UG Placement Rate)	Lower Confidence Bound (UG Placement Rate)	Upper Confidence Bound (UG Placement Rate)
2013	90.0%			
2014	90.0%			
2015	90.5%			
2016	89.6%			
2017	89.5%			
2018	91.1%			
2019	87.3%			
2020	91.0%	91.0%	91.0%	91.0%
2021		87.7%	85.7%	89.8%
2022		90.8%	88.7%	92.8%
2023		87.6%	85.1%	90.2%
2024		90.7%	88.1%	93.2%
2025		87.5%	84.5%	90.5%



**Goal 2: Percent of Seniors With at Least Two High Impact Practices (NSSE) Forecast in Table 44 and Figure 6**

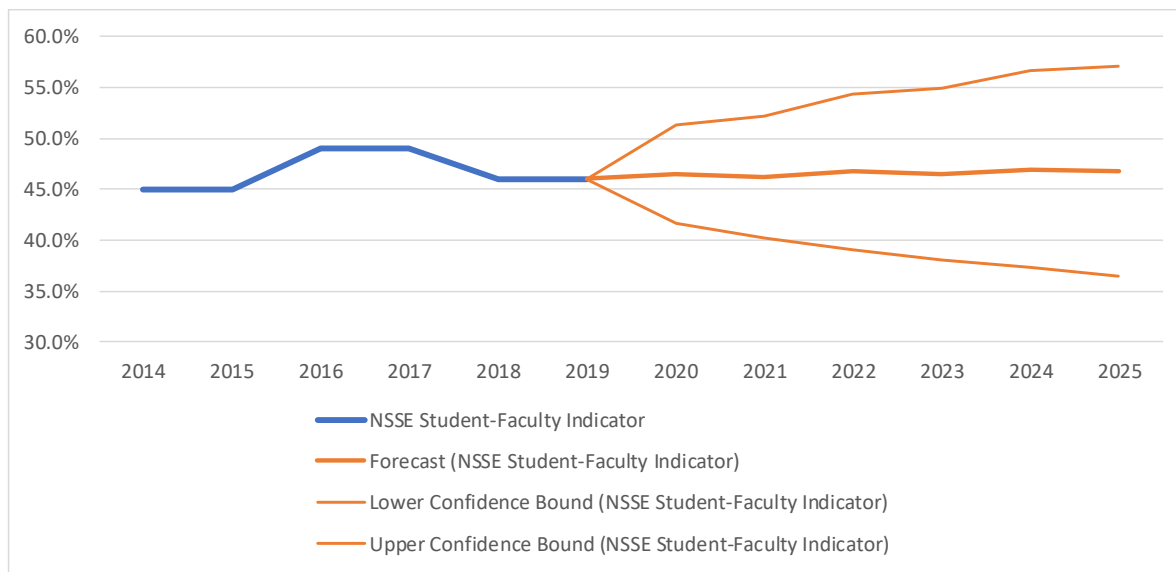
Year	High Impact Percentage	Forecast (High Impact Percentage)	Lower Confidence Bound (High Impact Percentage)	Upper Confidence Bound (High Impact Percentage)
2014	79.0%			
2015	79.0%			
2016	70.0%			
2017	70.0%			
2018	69.0%			
2019	69.0%	69.0%	69.0%	69.0%
2020		64.0%	58.6%	69.5%
2021		64.3%	57.5%	71.1%
2022		59.3%	50.6%	68.0%
2023		59.6%	49.9%	69.2%
2024		54.6%	43.5%	65.7%
2025		54.8%	43.0%	66.7%





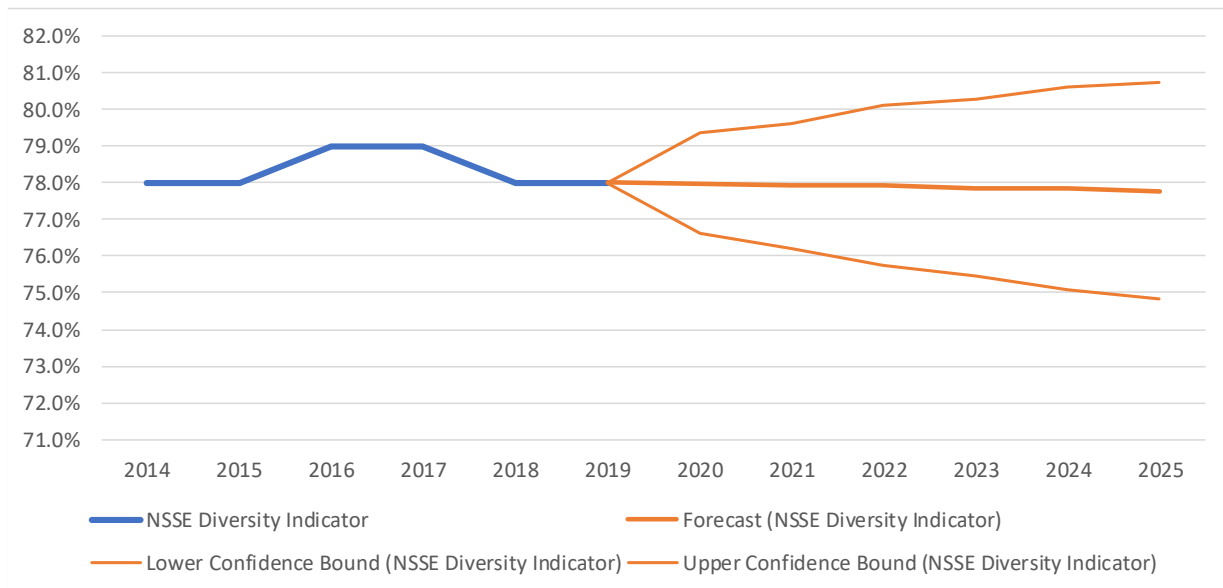
**Goal 2: Average Score of Seniors on the NSSE Student-Faculty Interaction Indicator Forecast in Table 45 and Figure 7**

Year	NSSE Student-Faculty Indicator	Forecast (NSSE Student-Faculty Indicator)	Lower Confidence Bound (NSSE Student-Faculty Indicator)	Upper Confidence Bound (NSSE Student-Faculty Indicator)
2014	45.0%			
2015	45.0%			
2016	49.0%			
2017	49.0%			
2018	46.0%			
2019	46.0%	46.0%	46.0%	46.0%
2020		46.5%	41.7%	51.3%
2021		46.3%	40.3%	52.2%
2022		46.7%	39.1%	54.4%
2023		46.5%	38.1%	55.0%
2024		47.0%	37.3%	56.7%
2025		46.8%	36.4%	57.1%



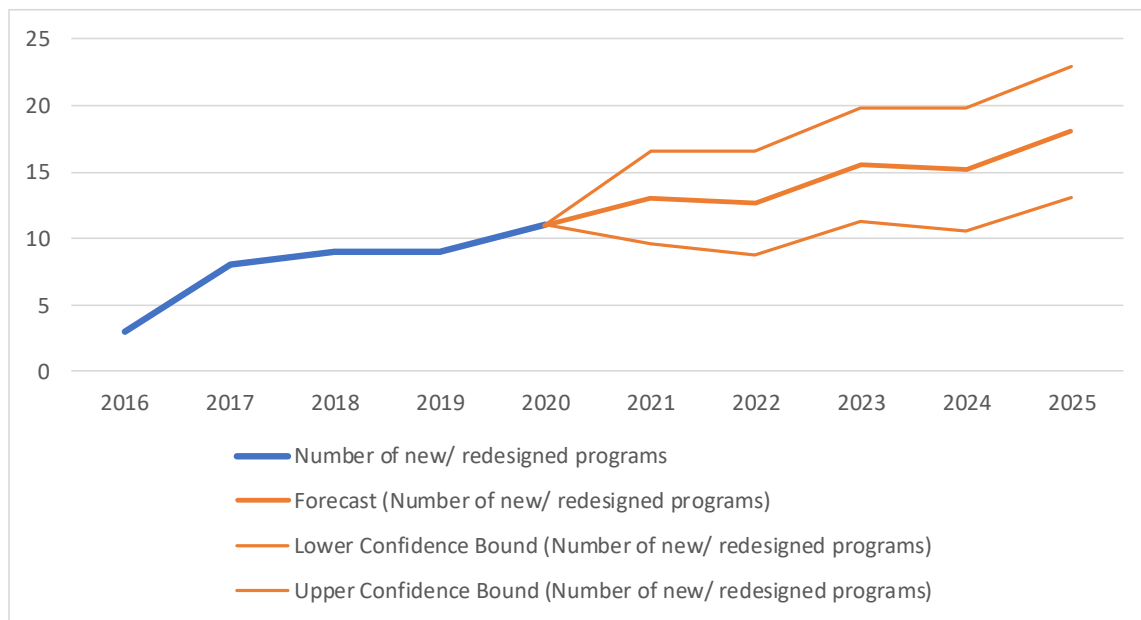
**Goal 2: Average Score of Seniors on the NSSE Diversity Indicator Forecast in Table 46 and Figure 8**

Year	NSSE Diversity Indicator	Forecast (NSSE Diversity Indicator)	Lower Confidence Bound (NSSE Diversity Indicator)	Upper Confidence Bound (NSSE Diversity Indicator)
2014	78.0%			
2015	78.0%			
2016	79.0%			
2017	79.0%			
2018	78.0%			
2019	78.0%	78.0%	78.0%	78.0%
2020		78.0%	76.6%	79.4%
2021		77.9%	76.2%	79.6%
2022		77.9%	75.7%	80.1%
2023		77.9%	75.4%	80.3%
2024		77.9%	75.1%	80.6%
2025		77.8%	74.8%	80.7%



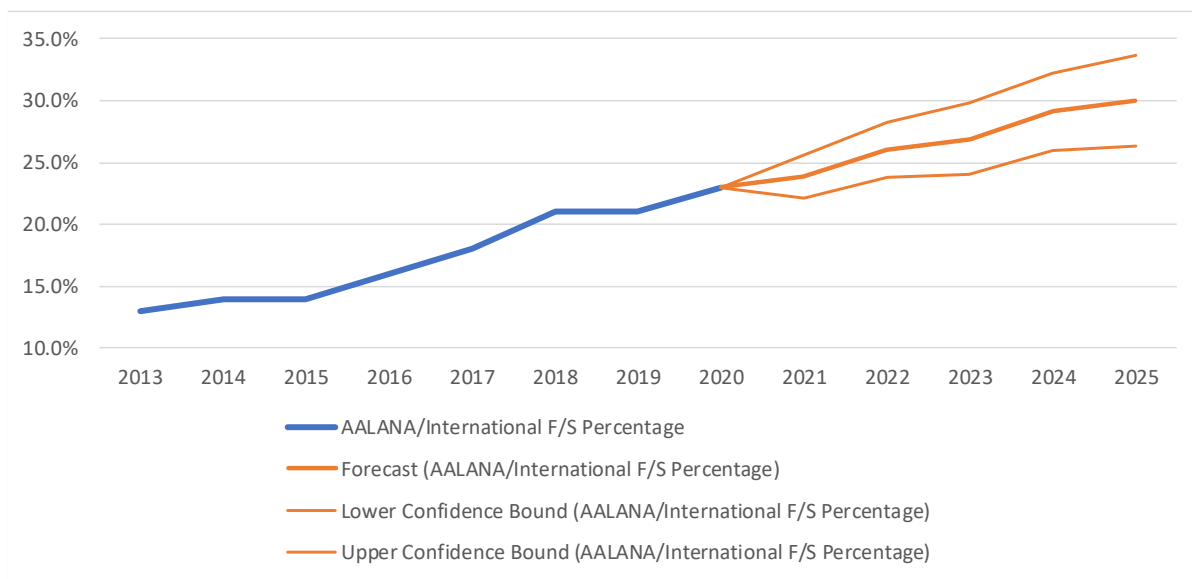
**Goal 2: Number of New / Redesigned Programs Forecast in Table 47 and Figure 9**

Year	Number of new/ redesigned programs	Forecast (Number of new/ redesigned programs)	Lower Confidence Bound (Number of new/ redesigned programs)	Upper Confidence Bound (Number of new/ redesigned programs)
2016	3			
2017	8			
2018	9			
2019	9			
2020	11	11	11	11
2021		13	10	17
2022		13	9	17
2023		16	11	20
2024		15	11	20
2025		18	13	23



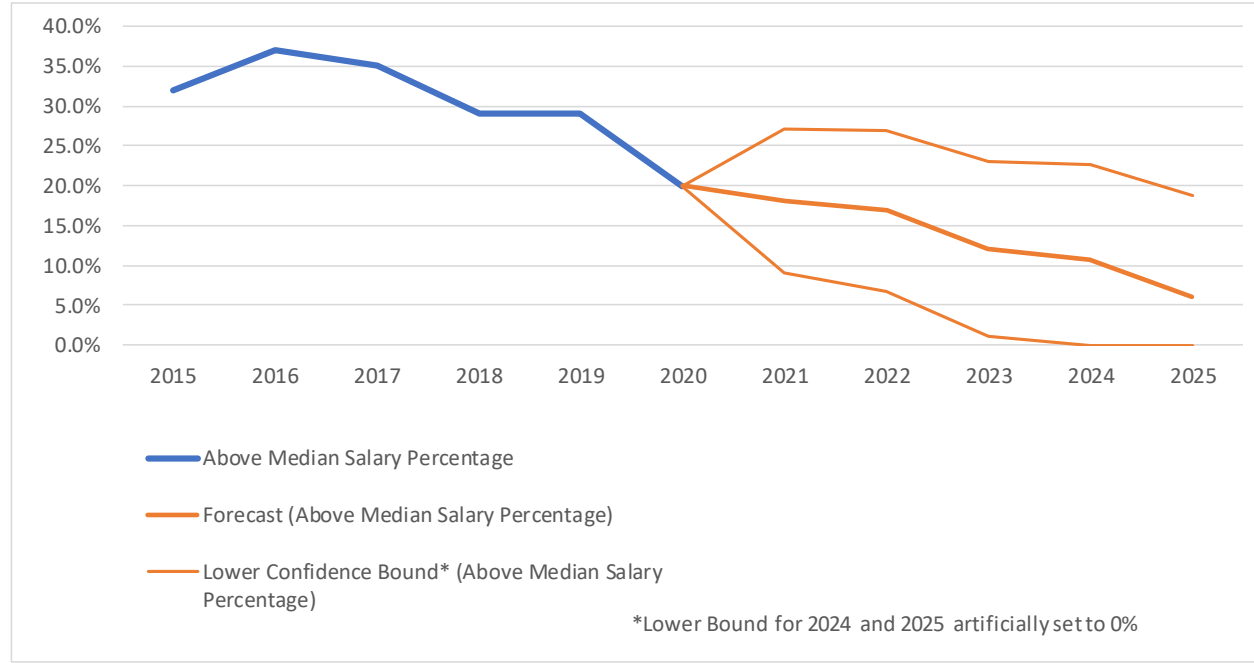
**Goal 3: Percentage of Faculty / Managerial Staff Who are Diverse Forecast in Table 48 and Figure 10**

Year	AALANA/International F/S Percentage	Forecast (AALANA/International F/S Percentage)	Lower Confidence Bound (AALANA/International F/S Percentage)	Upper Confidence Bound (AALANA/International F/S Percentage)
2013	13.0%			
2014	14.0%			
2015	14.0%			
2016	16.0%			
2017	18.0%			
2018	21.0%			
2019	21.0%			
2020	23.0%	23.0%	23.0%	23.0%
2021		23.9%	22.1%	25.7%
2022		26.0%	23.8%	28.3%
2023		26.9%	24.0%	29.8%
2024		29.1%	25.9%	32.3%
2025		29.9%	26.3%	33.6%



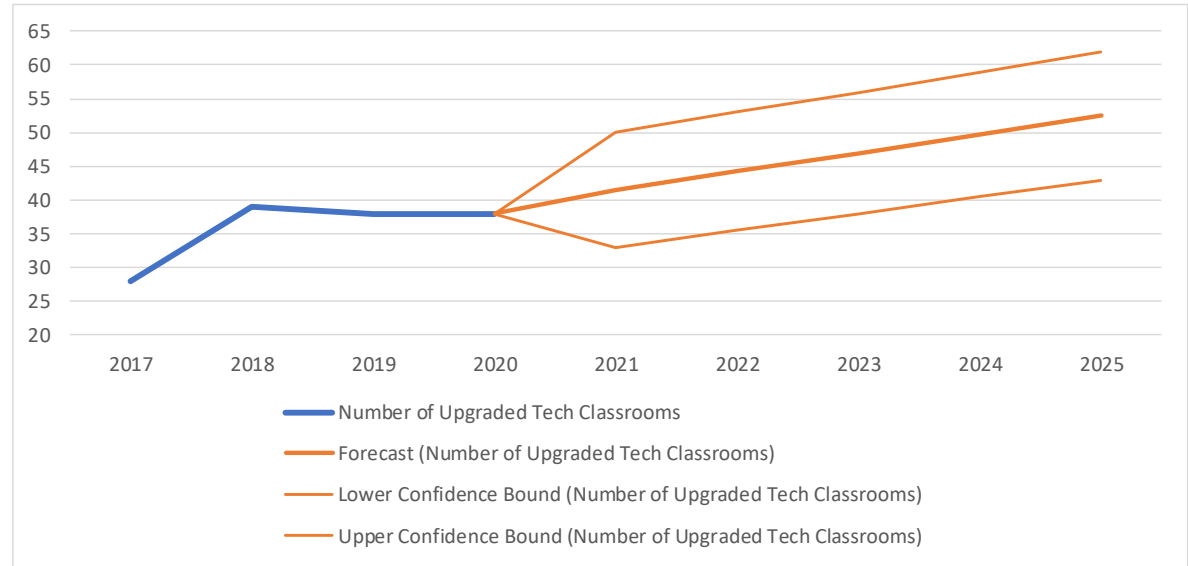
Goal 3: Percent Salary Above Median Forecast in Table 49 and Figure 11

Year	Above Median Salary Percentage	Forecast (Above Median Salary Percentage)	Lower Confidence Bound* (Above Median Salary Percentage)	Upper Confidence Bound (Above Median Salary Percentage)
2015	32.0%			
2016	37.0%			
2017	35.0%			
2018	29.0%			
2019	29.0%			
2020	20.0%	20.0%	20.0%	20.0%
2021		18.1%	9.1%	27.1%
2022		16.8%	6.8%	26.9%
2023		12.1%	1.0%	23.1%
2024		10.8%	0.0%	22.7%
2025		6.0%	0.0%	18.8%



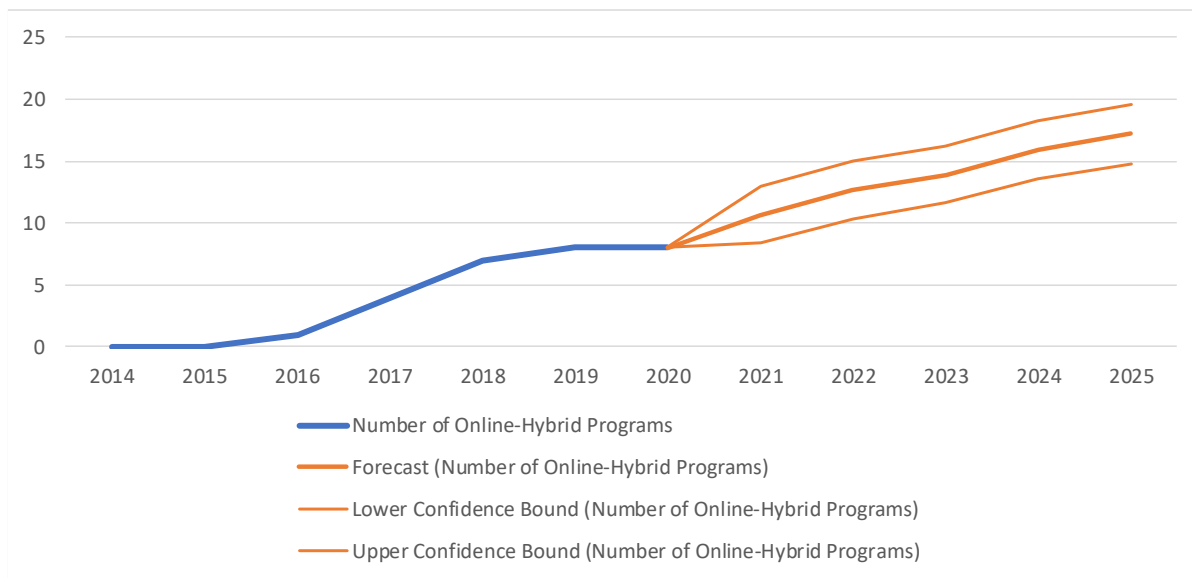
Goal 4: Number of Classrooms with Upgraded Technology Forecast in Table 50 and Figure 12

Year	Number of Upgraded Tech Classrooms	Forecast (Number of Upgraded Tech Classrooms)	Lower Confidence Bound (Number of Upgraded Tech Classrooms)	Upper Confidence Bound (Number of Upgraded Tech Classrooms)
2017	28			
2018	39			
2019	38			
2020	38	38	38	38
2021		41	33	50
2022		44	35	53
2023		47	38	56
2024		50	40	59
2025		53	43	62



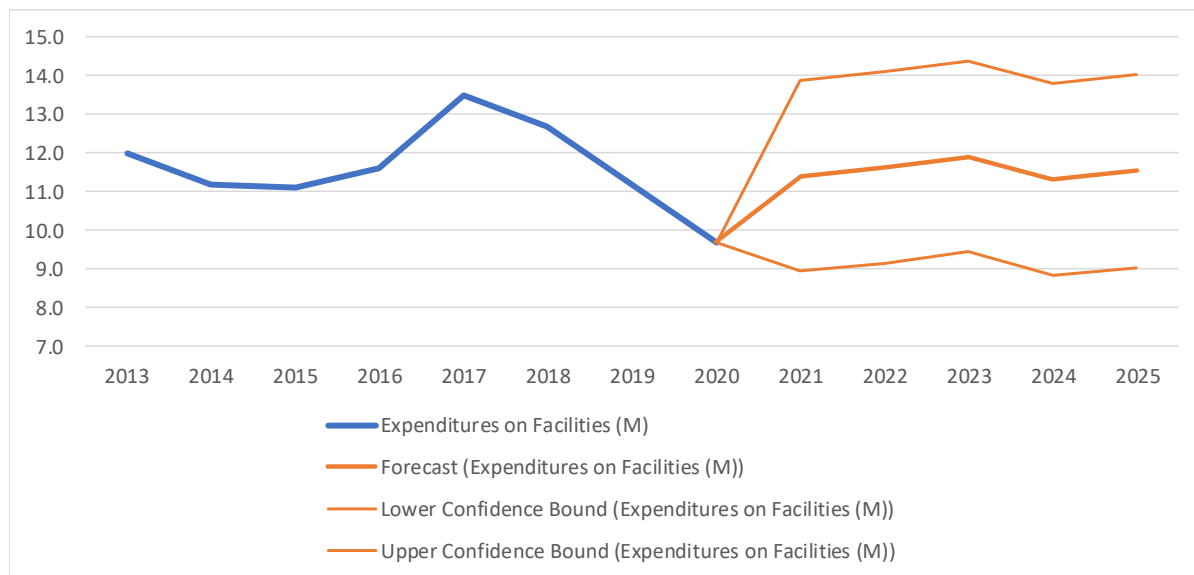
**Goal 4: Number of Online/Hybrid Programs Forecast in Table 51 and Figure 13**

Year	Number of Online-Hybrid Programs	Forecast (Number of Online-Hybrid Programs)	Lower Confidence Bound (Number of Online-Hybrid Programs)	Upper Confidence Bound (Number of Online-Hybrid Programs)
2014	0			
2015	0			
2016	1			
2017	4			
2018	7			
2019	8			
2020	8	8	8	8
2021		11	8	13
2022		13	10	15
2023		14	12	16
2024		16	14	18
2025		17	15	20



#### Goal 4: Expenditures on Facilities Forecast in Table 52 and Figure 14

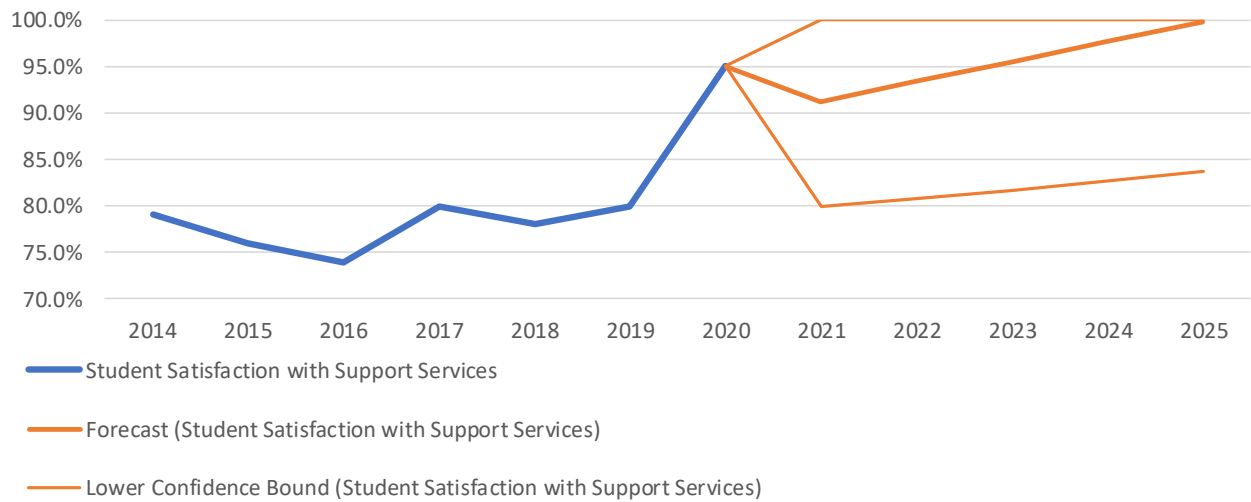
Year	Expenditures on Facilities (M)	Forecast (Expenditures on Facilities (M))	Lower Confidence Bound (Expenditures on Facilities (M))	Upper Confidence Bound (Expenditures on Facilities (M))
2013	12.0			
2014	11.2			
2015	11.1			
2016	11.6			
2017	13.5			
2018	12.7			
2019	11.2			
2020	9.7	9.7	9.7	9.7
2021		11.4	8.9	13.9
2022		11.6	9.2	14.1
2023		11.9	9.4	14.4
2024		11.3	8.8	13.8
2025		11.5	9.0	14.0





**Goal 4: Student Satisfaction with Support Services Forecast in Table 53 and Figure 15**

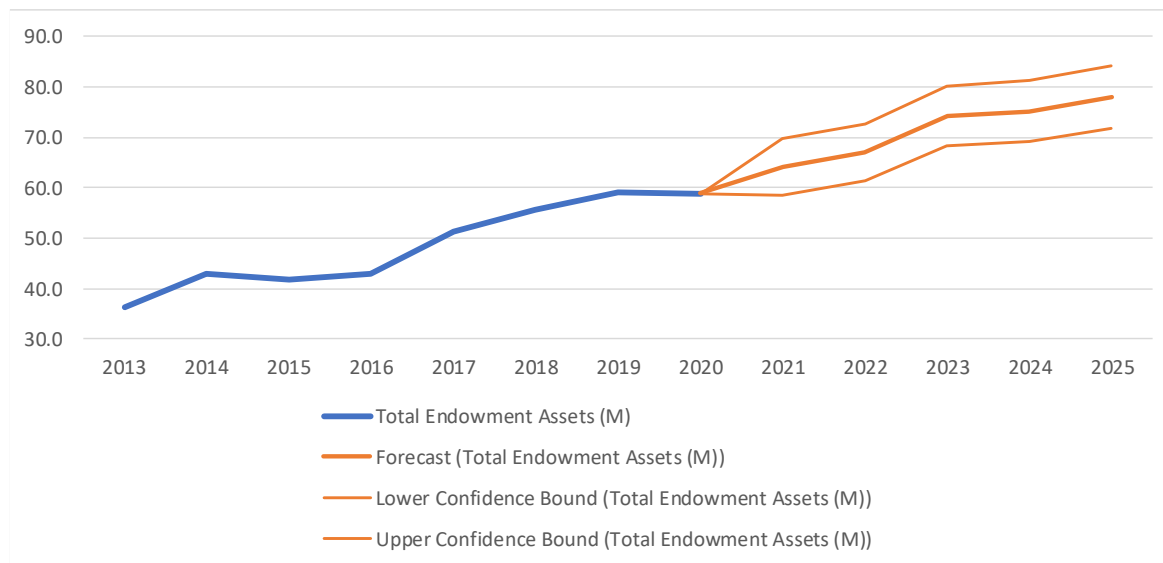
Year	Student Satisfaction with Support Services	Forecast (Student Satisfaction with Support Services)	Lower Confidence Bound (Student Satisfaction with Support Service)	Upper Confidence Bound* (Student Satisfaction with Support Services)
2014	79.0%			
2015	76.0%			
2016	74.0%			
2017	80.0%			
2018	78.0%			
2019	80.0%			
2020	95.0%	95.0%	95.0%	95.0%
2021		91.2%	80.0%	100.0%
2022		93.4%	80.8%	100.0%
2023		95.5%	81.7%	100.0%
2024		97.6%	82.7%	100.0%
2025		99.8%	83.8%	100.0%



\* Upper bound in 2021 - 2025 artificially set to 100%

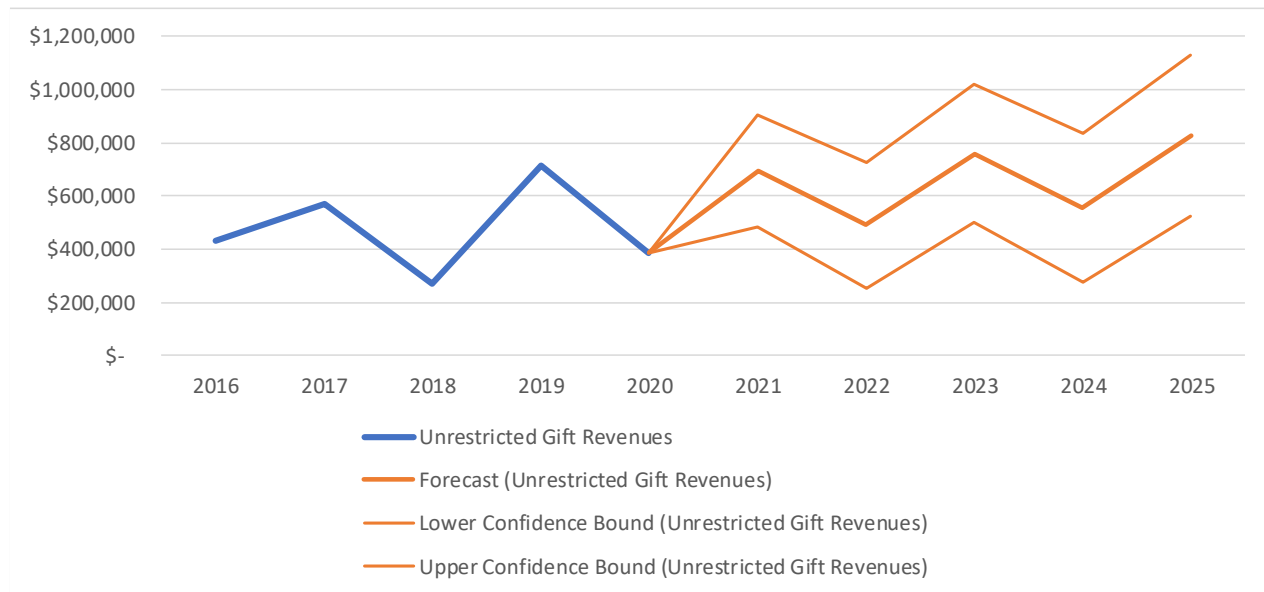
### Goal 5: Endowment Assets Forecast in Table 54 and Figure 16

Year	Total Endowment Assets (M)	Forecast (Total Endowment Assets (M))	Lower Confidence Bound (Total Endowment Assets (M))	Upper Confidence Bound (Total Endowment Assets (M))
2013	36.3			
2014	42.9			
2015	41.7			
2016	42.8			
2017	51.4			
2018	55.6			
2019	59.0			
2020	58.9	58.9	58.9	58.9
2021		64.1	58.5	69.7
2022		67.0	61.3	72.7
2023		74.1	68.2	80.1
2024		75.1	69.0	81.2
2025		78.0	71.8	84.3



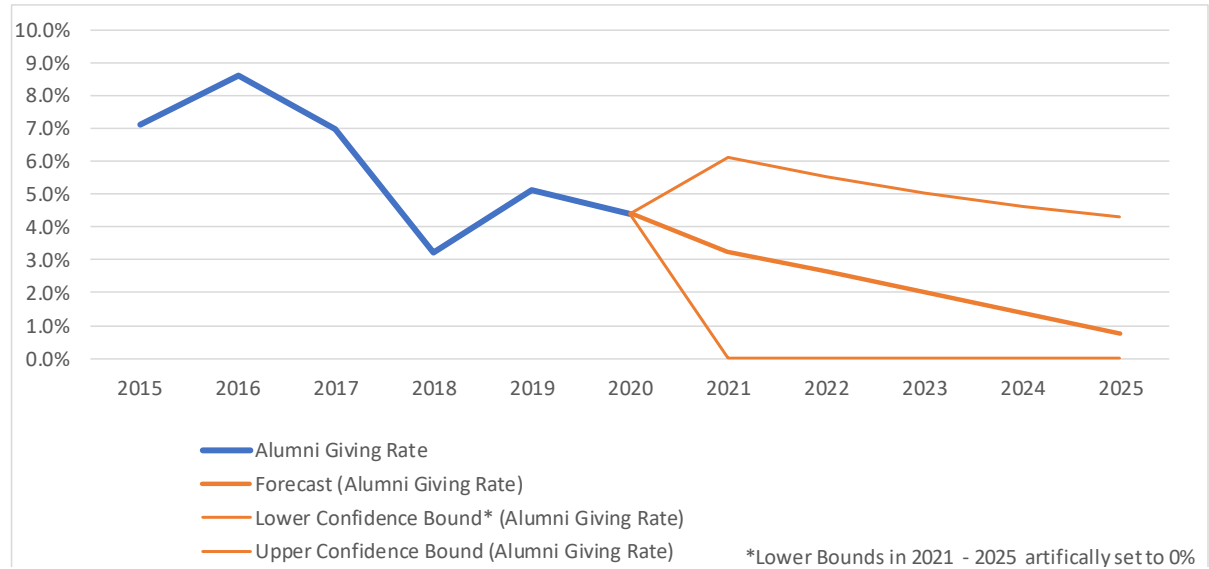
**Goal 5: Unrestricted Gifts Revenue Forecast in Table 55 and Figure 17**

Year	Unrestricted Gift Revenues	Forecast (Unrestricted Gift Revenues)	Lower Confidence Bound (Unrestricted Gift Revenues)	Upper Confidence Bound (Unrestricted Gift Revenues)
2016	\$ 433,362			
2017	\$ 567,786			
2018	\$ 270,147			
2019	\$ 714,437			
2020	\$ 387,316	\$ 387,316	\$ 387,316	\$ 387,316
2021		\$ 694,941	\$ 482,243	\$ 907,638
2022		\$ 490,111	\$ 252,118	\$ 728,105
2023		\$ 760,153	\$ 499,131	\$ 1,021,175
2024		\$ 555,324	\$ 273,146	\$ 837,501
2025		\$ 825,366	\$ 523,360	\$ 1,127,371



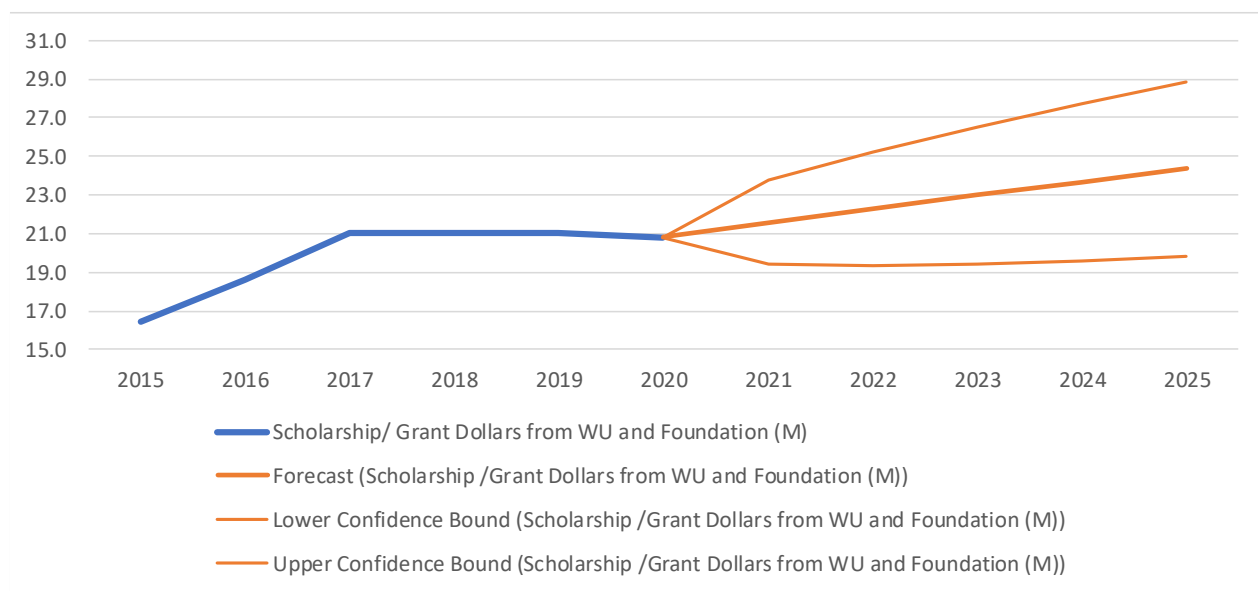
Goal 5: Alumni Giving Rate Forecast in Table 56 and Figure 18

Year	Alumni Giving Rate	Forecast (Alumni Giving Rate)	Lower Confidence Bound* (Alumni Giving Rate)	Upper Confidence Bound (Alumni Giving Rate)
2015	7.1%			
2016	8.6%			
2017	7.0%			
2018	3.2%			
2019	5.1%			
2020	4.4%	4.4%	4.4%	4.4%
2021		3.3%	0.0%	6.1%
2022		2.6%	0.0%	5.5%
2023		2.0%	0.0%	5.0%
2024		1.4%	0.0%	4.6%
2025		0.8%	0.0%	4.3%



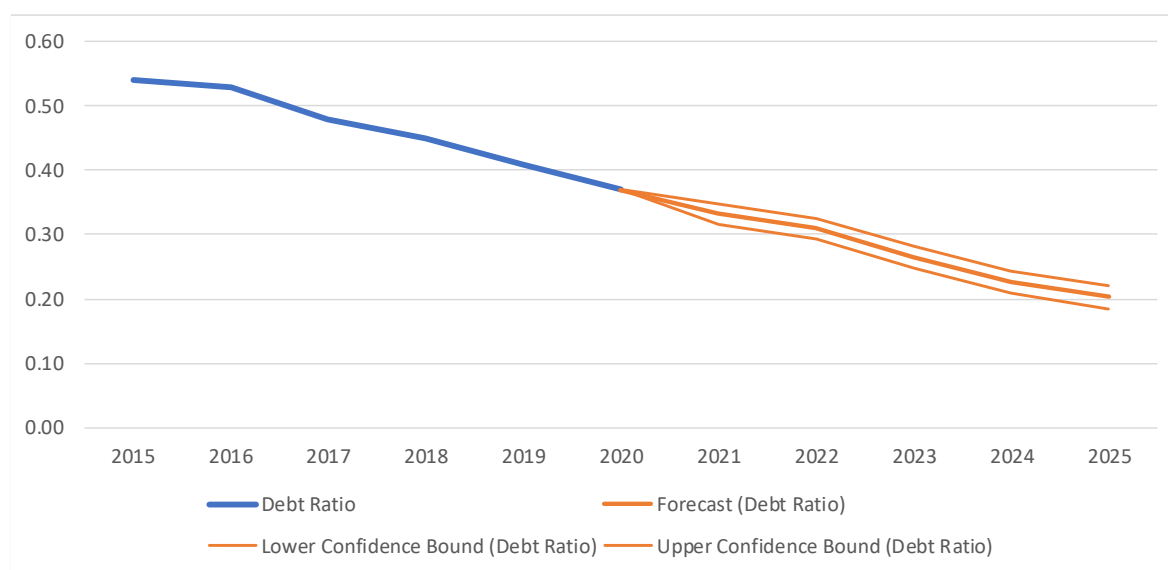
**Goal 5: Scholarship / Grant Dollars from Winthrop and Foundation Forecast in Table 57 and Figure 19**

Year	Scholarship/ Grant Dollars from WU and Foundation (M)	Forecast (Scholarship /Grant Dollars from WU and Foundation (M))	Lower Confidence Bound (Scholarship /Grant Dollars from WU and Foundation (M))	Upper Confidence Bound (Scholarship /Grant Dollars from WU and Foundation (M))
2015	16.4			
2016	18.6			
2017	21.0			
2018	21.0			
2019	21.0			
2020	20.8	20.8	20.8	20.8
2021		21.6	19.4	23.8
2022		22.3	19.3	25.2
2023		23.0	19.4	26.5
2024		23.7	19.6	27.7
2025		24.4	19.9	28.9



### Goal 5: Debt Ratio Forecast in Table 58 and Figure 20

Year	Debt Ratio	Forecast (Debt Ratio)	Lower Confidence Bound (Debt Ratio)	Upper Confidence Bound (Debt Ratio)
2015	0.54			
2016	0.53			
2017	0.48			
2018	0.45			
2019	0.41			
2020	0.37	0.37	0.37	0.37
2021		0.33	0.32	0.35
2022		0.31	0.29	0.33
2023		0.26	0.25	0.28
2024		0.23	0.21	0.24
2025		0.20	0.18	0.22



To summarize, six of the metrics are forecast to move in an undesired direction in 2025, highlighted in red font in Table 59. The Goal 1 metrics of **headcount** and **placement rate** are forecast to decrease by 2.6% and 3.8%, respectively. Goal 2 metrics of **HIP participation** and **NSSE diversity indicator** are forecast to decrease by 20.5% and .3%, respectively. The Goal 3 metric **percent of full-time salary at or above median** is forecast to decrease by 100% reaching 0% salaries at or above the median by 2025 and, unfortunately, there is enough data available to predict **employee satisfaction**. Finally, **alumni giving rate** is forecast to decrease by 83% reaching less than 1% by 2025. All other metrics are forecast to move in the desired direction.

**Table 59 - Actual and Forecast Values For Winthrop Plan Strategic Metrics**

<b>Goal</b>	<b>Metric</b>	<b>2020 Actual</b>	<b>2025 Forecast</b>	<b>% change</b>
<b>Goal 1</b>	Headcount	5,576	5,431	-2.6%
	First-year Retention Rate	69.9%	70.7%	1.1%
	Six-year Graduation Rate	60.7%	65.7%	8.2%
	Placement Rate	91.0%	87.5%	-3.8%
	% Students Diverse	45.0%	45.8%	1.7%
<b>Goal 2</b>	% Seniors Graduate with >= 2 HIP's	69.0%	54.8%	-20.5%
	Avg. Senior NSSE Diversity Indicator Score	78.0%	77.8%	-0.3%
	Avg. Senior NSSE Student-Faculty Interaction Indicator Score	46.0%	46.8%	1.7%
	New and Redesigned Programs	11	18	63.8%
<b>Goal 3</b>	% Faculty / Managerial Staff Diverse	23.0%	29.9%	30.2%
	% full-time employee salary at or above median	20.0%	0.0%	-100.0%
	Employee Satisfaction	Not enough data available to forecast		
<b>Goal 4</b>	Classrooms with Upgraded Technology	38	53	38.2%
	Student Satisfaction with Support Services	95.0%	99.8%	5.0%
	Online/hybrid degree programs	8	17	115.0%
	Expenditures on Facilities (in millions)	\$ 9.70	\$ 11.5	18.9%
<b>Goal 5</b>	Endowment Assets (in millions)	\$ 58.9	\$ 78.0	32.5%
	Unrestricted Gift Revenue	\$ 387,316	\$ 825,366	113.1%
	Alumni Giving Rates	4.4%	0.8%	-82.5%
	Scholarship / Grant dollars from University & Foundation (in millions)	\$ 20.80	\$ 24.37	17.2%
	Debt ratio*	0.37	0.20	-45.2%

*\*a decrease in this metric is a positive outcome*