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Chapter 1: Executive Summary

Executive Summary Goes Here. This will be written after all feedback has been gathered and the document has been updated accordingly and finalized.

draft

Chapter 2: Introduction

Overview (Profile)

Mercyhurst University is an accredited, not-for-profit, four-year, Catholic liberal arts institution. Originally founded as Mercyhurst College by the Sisters of Mercy in 1926, the university was chartered in 1928, enrolled its first coeducational class in 1969, opened its first graduate program in 1978, and is now considered a *Master's College & University: Medium Program* by the Carnegie Classification system.

The Sisters of Mercy, whose roots can be traced to Mother Catherine McAuley who founded the Sisters of Mercy in Dublin, Ireland, have always committed their lives and works to serving those who are poor, sick, and uneducated. This commitment, as well as the Sisters of Mercy fourth vow of service, has always been central to the mission and values of Mercyhurst University. A Mercyhurst education aims at engaging students for life and at creating leaders in justice and service.

Mercyhurst University is located in Erie, Pennsylvania, overlooking Lake Erie. The University enjoys the advantages of a suburban setting only minutes from the downtown area of the City of Erie. Erie, located in northwestern Pennsylvania, is the largest city in that part of the Commonwealth and is the fourth largest city overall in Pennsylvania. Erie is approximately equidistant (two hours driving time or less) from the cities of Pittsburgh, Pennsylvania; Cleveland, Ohio; and Buffalo, New York. Mercyhurst University currently operates two additional locations in inner-city Erie and also in rural Corry, PA. Mercyhurst Dungarvan in Ireland serves as an instructional site. In addition, situated in North East, PA, a branch campus housed the university's associate degree programs from 1991 until 2021, when the campus closes, and all programs relocate to the main campus.

Academics

Consistent with the tradition of the institution, Mercyhurst University is strongly committed to providing each student with an education grounded in the liberal arts. Along with the commitment to the liberal arts, the University offers signature academic programs that enable students to develop competitive job skills in high demand areas. The following sections describe the academic offerings at the institution.

REACH Liberal Arts Curriculum

The current iteration of the general education curriculum, REACH, provides students with a broad-based education that is grounded in the Mercy mission. The courses in this experience are designed to challenge mindsets and assumptions, enable the development of critical thinking and problem-solving skills, encourage curiosity and creative inquiry, cultivate an appreciation of arts and culture, ignite community awareness and engagement, and help instill in the students a resilience in the face of challenges.

The REACH curriculum is comprised of the following parts:

The Freshman Experience - An introduction to academic writing and thought, as well as to college life. This experience requires the foundational research/writing/composition course, as well as two one-credit courses to help ease the transition from high school to college and introduce students to the mission and values of the institution.

The Liberal Arts Experience – A series of ten courses in ten different disciplines across five different themes. This experience provides students with the opportunity to ensure a breadth of knowledge across the liberal arts while also ensuring flexibility for productive degree pathways.

The Senior Experience – A true capstone experience, with one shared Ethics Capstone course for all students at the institution, as well as a designated capstone experience within the major programs.

outREACH – a credit-based service experience that is designed to have students meaningfully engage with *others* and then complete a series of guided reflections that promote putting the Mercy Mission into action in other experiences.

Academic Programming

The University furnishes students with opportunities for gaining pertinent knowledge and skills necessary for lasting success in a career and for making meaningful contributions to society. In addition to a variety of undergraduate programs, the University offers graduate programs leading to a Master of Science degree in the Administration of Justice, Special Education, Secondary Education, Organizational Leadership, Physician’s Assistant Studies, Applied Forensic Sciences, Applied Intelligence, Cyber Risk Management, Cyber Security, and Data Science.

Supporting the academic program, Mercyhurst University has a full-time faculty of 184, of whom 142 teach on the Erie Campus. Of the 142 full-time faculty on the Erie Campus, 65 have tenure and 68% hold terminal degrees. The University also employs approximately 350 staff and administrators. Academic departments on the Erie Campus are organized into four colleges, each overseen by a dean and associate dean who report to the Vice President for Academic Affairs.

Academic Accreditations

The University is accredited by the Middle States Commission on Higher Education (MSCHE), last reaffirmed in 2014. Mercyhurst participated in the Mid-Point Peer Review Process in 2018, where the Commission acted as follows:

To note that the Mid-Point Peer Review has been conducted. To request that the next self-study, in preparation for a visit in 2021-2022, provide further evidence of (1) improvement of key indicators of student success, including retention and graduation rates (Standard IV); (2) clearly stated policies, processes and programs to admit, retain and facilitate the success of all students (Standard IV); and, (3) improved financial viability and sustainability with evidence of sufficient resources to improve student achievement measures (Standard VI and Requirement of Affiliation 11).

Additionally, the University has specific programs that are accredited by a number of organizations. Along with the degrees that the University is authorized to offer under its charter, the University is authorized to offer programs leading to teacher certification from the Commonwealth of Pennsylvania in a number of areas.

Significant changes and challenges since last self-study

Leadership

Since the last Middle States Accreditation process that was finalized in 2014, Mercyhurst University has had significant change in leadership. The first of two new administrations was installed in August 2015. In contrast to the prior administration, the new administration prioritized robust planning, analysis, and financial forecasting and focused on professionalism, accountability, data-driven decision-making, transparency, shared governance, and a re-dedication to the Mercy mission. In February 2021, the university president retired. The sitting chair of the university board of trustees stepped down from his position to assume the role of interim president until a presidential search process could be completed. In July, 2021, Mercyhurst welcomed a new president and a new administration. The position of university provost was eliminated and the position of vice president for academic affairs, absent at the university for over a decade, reestablished.

Strategic planning

Beginning with the prior administration, Mercyhurst has implemented significant changes in its approach to strategic planning. In 2017, the university began the process for a new plan to take effect from 2018-2020 and entitled, *Renewal Through the Mercy Mission*. This plan reflected the efforts of the Victor administration to lead the university community to a rededication to the primacy of the Mercy mission and to infuse it throughout the academic, campus life, administrative areas of the university with special emphasis on envisioning a new future for the North East campus, as evidenced by the four goals of the plan. The process included input from all constituencies through focus group meetings and events. The board of trustees voted to extend this plan to 2021. Though the planning process for the current plan, entitled *Mission Inspired. Future Ready. 2021-2024* began in October 2019, that process was interrupted by the pandemic. The goals of the current plan were developed as a result of a comprehensive evaluation of Mercyhurst core values and mission. In addition, the plan serves as a guide for making key institutional decisions and allocating resources. Metrics to determine progress are shared with key stakeholders. The plan will be reviewed by the Mercyhurst community on an annual basis.

Curricular change

The prior administration dramatically changed the approach to the general education curriculum at the same time that it made additional alterations to the academic calendar and academic organizational structure. For the first time, the focus of the general education curriculum became loosed from departments and courses and firmly tied to the principles inherent in the acronym used by Mercyhurst University: REACH. Thus, this curriculum has at its center the triad of Mercy, Mission, and Academic Excellence. The Mercy and Mission components are supported by three course experiences, the first is taken first semester of the first year, the second taken by the end of the second year, and the third in the senior year. The Academic Excellence component is addressed through the ten-course-requirement of the liberal arts program areas represented by the acronym: **R**eason & Faith, **E**xpression & Creativity, **A**nalytical Thought, **C**ontexts & Systems, and **H**umans in Connection. Embedded in the Mercyhurst REACH curriculum is Mercy and mission activity, through the BTG requirement, as well as multiple points of student reflection on their engagement with and personal growth in all three components of the curriculum.

Campus consolidation

Mercyhurst University is committed to educating students in the Mercy tradition. To that end, the North East campus was founded in 1991 as an “opportunity and career college” dedicated to providing post-secondary education for capable learners who sought to learn job-entry skills, in essence fulfilling the role of a community college in the Mercyhurst tradition. The purpose of the North East campus was to provide an accessible and affordable education to students while preparing them to successfully manage future academic, career, and life challenges. While the programs offered at the North East campus have varied, the majority of the programs were in allied health disciplines and other health professions. These programs, such as occupational therapy assistant, physical therapist assistant, respiratory therapy, and both LPN and RN nursing programs, along with other programs in business, criminal justice, and hospitality management, remain strong and valuable programs for our students. Moreover, Mercyhurst University is committed to offering the strong allied health and career and technical education programs well into the future.

However, in the nearly three decades that has passed since the founding of Mercyhurst North East, the needs and demographics of students in the region has changed. In fact, the change has been so significant that the original goal of the North East campus – to provide accessible and affordable education to students – is no longer best met by having certificate and associate degree programs housed in a separate location. Thus, the decision to consolidate the associate degree programs to the Erie campus and no longer use the North East branch campus location was made after considerable time and analysis. The senior leadership team at Mercyhurst University spent two years monitoring the status of the North East campus, including enrollment, student outcomes, and finances. The Board of Trustees of Mercyhurst University carefully reviewed data and considered potential pathways forward to ensure the success of the University as a whole, while still fulfilling the mission-driven goals that originally motivated the creation of the North East campus. The Board of Trustees made the decision that closing the North East campus was the only reasonable conclusion to ensure the University’s ability to continue meeting its mission to educate students in the Mercy tradition and to have a prosperous university well into the future. As such, Mercyhurst University submitted a Substantive Change for Closure of a Branch Campus in the fall of 2019. That action was approved by the Commission at their January 2020 meeting, and the university’s efforts toward a smooth consolidation have swiftly followed.

Assessment

Since the last Middle States accreditation process in 2014, Mercyhurst University has experienced studied change in its approach to assessment. An almost complete lack of commitment to assessment principles and practices, leading us to be placed on warning by the commission, became the impetus to free the institution to embrace assessment as a necessary and vital component of ensuring academic excellence. First efforts at committing to assessment of student learning were overly ambitious and unsustainable. In the years since, an Office of Institutional Effectiveness was created to work with departments to ensure that assessment plans are manageable in scope, that methods used to assess are aligned with goals to be achieved, and that specific methods are at the same time developed to determine how best to implement future action plans based on assessment data.

The Self Study Process

Self-Study Approach

Mercyhurst University elected to follow a standards-based approach for the self-study. This decision was motivated by a number of factors, including the fact that Mercyhurst was coming to the end of one Strategic Plan (“Renewal Through the Mercy Mission”: 2018-20) and beginning the process of another. A standards-based approach, then, permitted us to begin the work of the self-study analysis immediately and form/charge the Working Groups even before strategic planning level institutional priorities had been clearly delineated for the 2020-23 strategic plan.

Organizational Structure of the Steering Committee and Working Groups

In anticipation of the self-study process, Mercyhurst University’s President and then Provost, in consultation with the Office of Institutional Effectiveness, selected a Chair of the MSCHE Self-Study Steering Committee. To better prepare for the process, the Chair of the Steering Committee and the Assessment Coordinator attended the October 2019 MSCHE Self-Study Institute. Shortly thereafter, the President and the Cabinet finalized the Steering Committee membership and charged them with overseeing the MSCHE Self-Study process.

Criteria for members of the Steering Committee were based on the following:

- Individuals who are familiar with the Mission, Core Values, and goals of Mercyhurst;
- Individuals who have a sense of commitment to the self-study process and to the institutional priorities of Mercyhurst;
- Individuals who have the capacity for a broad institutional perspective that transcends their own niche areas;
- Individuals who represent various institutional constituencies;
- Individuals who bring various and necessary areas of expertise to the self-study process.

As a result of applying those criteria, the following individuals were asked, and agreed, to serve on the Steering Committee:

Table 1 Steering Committee Membership

Participant Name and Role	Title
Dr. Joanne Hosey-McGurk, Co-Chair	Assistant Professor of English
Dr. Dyan Jones, Co-Chair	Associate Provost for Institutional Effectiveness
Dr. Carrie Allen	Assessment Coordinator
Ms. Abigail Staub, '21	Mercyhurst Student Government President
Mr. Jeffrey Taylor	Director of Finance and Budget
Dr. Laura Zirkle	Vice President for Student Life

The same criteria were applied to creating the Working Groups based on a standards-approach. The Steering Committee members created both the chair positions for each Working Group as well as all of its members.

Each Working Group for the seven standards and compliance were provided with a set of relevant to that Working Group in an initial face-to-face meeting between Steering Committee members and the chairs of the eight Working Groups. Each Working Group received a charge that contained information specific to their task as well as a set of common information.

Communication between Working Groups and the Steering Committee being of paramount importance to the Steering Committee, Microsoft Teams has been enlisted to allow communication within Working Groups and between all Working Groups and the Steering Committee.

Further, each employee member of the Steering Committee agreed to serve as the liaison for two of the Working Groups. The liaison serves as a direct conduit to and from the Working Group and the Steering Committee. In addition, Working Group chairs can contact the Steering Committee chair or other members relevant to their question or concern directly.

Organization of the Self Study

The Self-Study Report is organized by chapter. Initial chapters provide an overview of the process and institution. Subsequent chapters are organized by Standard, with each Standard-focus chapter containing an overview, summary of findings, analysis, improvements, and innovations. Each chapter also has an appendix that contains links to the appropriate documents in the Evidence Inventory.

	Table of Contents
I.	Executive Summary
II.	Institutional Overview
III.	Standard I: Mission and Goals
IV.	Standard II: Ethics and Integrity
V.	Standard III: Design and Delivery of the Student Learning Experience
VI.	Standard IV: Support of the Student Experience
VII.	Standard V: Educational Effectiveness Assessment
VIII.	Standard VI: Planning, Resources, and Institutional Improvement
IX.	Standard VII: Governance, Leadership, and Administration
X.	Key Findings: Improvements and Innovations

Chapter 3: Standard I – Mission and Goals

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

Overview

Mercyhurst University meets the requirements of Standard I. A full description of the ways Mercyhurst University meets the four criteria and all applicable sub-criteria of Standard I, as well as the Requirements of Affiliation 7 and 12, are presented throughout this chapter.

The university has a clearly articulated mission and core values that exhibit a vibrant presence in the life of the university, reflect clearly its Sisters of Mercy tradition and Catholic liberal arts identity, ground the actions and decisions of university leadership and governance, function as critical touchstones in planning and assessment, guide program development and implementation to enhance and ensure the student experience, and support a campus environment that embraces tolerance, diversity, community, and well-being.

Placing Mission at the Center

Explicit and unequivocal, the Mercyhurst University Mission, Vision Statement, and Core Values articulate the commitment the university makes to the student experience as central to its identity. (S1.C1: Mission, Vision, and Core Values)

Mission Statement

Consistent with its Catholic identity and Mercy heritage, Mercyhurst University educates diverse persons in a culture where faith and reason flourish together, where the beauty and power of the liberal arts combine with an appreciation for the dignity of work and a commitment to serving others. Confident in the strength of its student-faculty bonds, the university community is inspired by the image of students whose choices, in life and work, will enable them to realize the human and spiritual values embedded in everyday realities and to exercise leadership in service toward a just world.

Vision Statement

Mercyhurst University seeks to be a leading higher educational institution that integrates excellence in the liberal arts, professional and career-path programs, and service to regional and world communities.

Core Values

Through its Core Values Statement, the university nuances the mission through an articulation of the values and viewpoints that differentiate the university as a provider of higher education in the 21st century marketplace. The university's core values offer important framing for how the university applies its mission in response to external constituencies and contexts and connects its values to both the external world and the internal world of the individual. The first two core values, *Socially Merciful* and *Globally Responsible*, describe the dispositions of Mercyhurst University towards various peoples, challenging social conditions, and the conditions of the earth itself. The last two core values, *Intellectually Creative* and *Reflectively Aware*, point to the internal world of the student. These values invite students to sharpen their intellectual capacities while maintaining creativity and critical self-awareness. The middle core value, *Compassionately Hospitable*, is the nexus binding self to other,

beginning with self-acceptance and extending beyond to encountering and welcoming otherness in various forms. The final overarching value, *Ambassadors of Service*, provides the critical intersection, resonating with the mission commitment to serving others and dedicated to Mercy as concerted action for the common good.

Promoting Mission Identity and Integrity

The value the university places on its mission and core values is strongly evidenced by the consistent presence of both as foundational elements in all critical university documents, as well as key internal and external publications both in print and online. Further, they are indisputably present in all aspects of how Mercyhurst University expresses its identity and binds its internal constituencies, which includes students, faculty, staff and trustees, and its external constituencies, particularly alumni and the regional community that surrounds and supports the university.

The mission and core values are rooted firmly in its Sisters of Mercy tradition and Catholic Liberal Arts commitment. While there are many examples of the identity connection, the university's affiliation with the Conference on Mercy Higher Education (CMHE) is a particularly strong illustration of an on-going commitment to living its Mercy and Catholic identity. As one of seventeen colleges and universities affiliated with the Sisters of Mercy, the university maintains all necessary components of its covenantal agreement and maintains strong lines of communication with the CMHE. The president, vice president for academic affairs, and vice president for mission participate in regular meetings with CMHE leadership and their peers from other Mercy-affiliated colleges and universities. The university completed its decennial self-study and peer review process through the CMHE in October 2020. (S1.C1: CMHE 2020 Self-Study) As the closing paragraph from the visiting team's final report states:

“The Visiting Team found Mercyhurst University to be a warm and welcoming community passionate for its Mercy mission. The commendations, recommendations and observations in this report reflect an institution that draws vigor and joy from its history and traditions and is well-poised for the continued growth and deepening of that mission. The Mercyhurst community recognizes the charism of Mercy as its ‘superpower’ and for this, the Conference for Mercy Higher Education celebrates Mercyhurst and looks forward to many more years of an excellent Mercy higher education presence in Erie—and beyond.” (S1.C1: CMHE 2020 Final Report)

The mission and core values are explicitly present in the day-to-day experiences of the university. As detailed below, since the inauguration of President Michael Victor in 2015, the mission and core values have provided not just the spirit, but also the narrative force behind institutional strategic planning, as evidenced through the previous strategic plan “2018-2021: Renewal Through Mercy” (S1.C1: 2018-2021 Strategic Plan) and the current strategic plan “2021-2024: Mission Inspired, Future Ready.” (S1.C1: 2021-2024 Strategic Plan) In grounding institutional goals in an explicit commitment to mission and core value principles such as the liberal arts, the student experience both in and outside the classroom, diversity and inclusion, and mindful stewardship of institutional resources, both the current and previous university strategic plans ensure the centrality of mission and core values as the university moves forward.

Additional examples of the presence of mission and core values abound. Detailed later in this chapter, many of these are high-profile and operations-critical, such as requiring new members of the board of trustees to serve

on the board's mission sub-committee in their first year, having the vice president for mission serve at cabinet level, grounding the REACH core curriculum and outREACH initiatives in mission, and tying all departmental assessment processes and plans to specific and explicit mission relevance.

Other examples speak to the presence of mission and core values as essential elements in the shared identity and enterprise that bind the members of the Mercyhurst community together. For every member of the community, mission is present from the first moment of contact and is continually reinforced. For students, the process begins with admissions. Key admissions processes, including large admission events and on-campus tours, specifically address mission, and the admissions viewbook highlights mission, signals inclusion and hospitality through "a tapestry of identities," and describes community engagement experiences, including the Beyond the Gates (BTG) core requirement and service learning travel programs. (S1.C1: Admissions Viewbook) Mission content is part of freshmen orientation and reinforced further, as detailed below, through the coursework associated with the outREACH graduation requirement (iMU, BTG, and Capstone Ethics) (S1.C1: Undergraduate Course Catalog - REACH).

For faculty, administration, and staff, both the Employee Handbook and the Faculty Handbook describe the university mission and the history of the university. (S1.C1: Employee Handbook p.2-3, S1.C1: Faculty Handbook p.2) Mission awareness is also wired into hiring and onboarding processes through the practice of having the vice president for mission included in all faculty hiring processes. (S1.C1 Faculty Hiring Guidelines) Employee onboarding includes mission orientation led by the vice president for mission, and performance reviews processes include assessment of the employee's "support of the University's mission and core values through their behavior and daily interactions with students, employees, and guests." (S1.C1 Performance Review Process)

Still other examples include critical investments in mission identity through formation of programs such as the Mercy Emissaries program or the Mercyhurst Ambassadors. (S1.C1: Mercy Emissary Brochure; S1.C1: Mercy Emissary Article p.8-9) As stated in its brochure, the Mercy Emissary program was founded in 2015 "to empower employees as guardians of Mercy and Catholic higher education...embody a whole new way of Mercy leadership in higher education... [and foster] a hope-filled mission community." Participants in the year-long voluntary program gather monthly to learn and discuss mission content, including the Sisters of Mercy legacy, Catholic Intellectual Tradition and Catholic Social Teaching, and Catholic and Mercy spirituality. Following the initial year-long training, Emissaries gather for periodic additional trainings, retreats, social events, and service and social justice advocacy opportunities. Since its inception, 156 employees have completed the program. A student version of the program began in academic year 2019-2020, and the first alumni emissary group took place beginning in Fall 2020. After consideration of CMHE recommendations in 2020, the Board of Trustees implemented Emissary training content for all full board meetings beginning with the February 2021 meeting, wherein fifteen minutes of each full board meeting are set aside for these mission-centered presentation and discussions. (S1.C1: Mercy Emissary Student Brochure) Finally, like the Mercy Emissaries, the Mercyhurst Ambassadors is a mission- and legacy-building organization for students. (S1.C1: Mercy Ambassador Brochure) Each year, students apply and are selected to be ambassadors following a rigorous training on the history and mission of the university. As the Ambassador program statement notes, students in this program recognize that they have an essential duty to carry on the mission of the founders, the Sisters of Mercy, and to model the values inherent in the university mission and core values.

Rounding out these larger scale mission initiatives are many simple but vital events and communication portals that support and transmit mission understanding and commitment, such as the cherished annual traditions of Mercy Week and the Mass of the Holy Spirit, the Day of Service as part of freshmen orientation, Mission cards at all meetings of the Board of Trustees, Jeans for a Cause, and the “Mercyhurst Gives” events. (S1.C1 Mercy Events Summary) In addition, periodic initiatives use both printed materials and digital means to highlight the mission (S1.C1 Mercy Communications Summary), such as:

- the Campus Ministry electronic bulletin is emailed to all students each Tuesday, listing regular events in campus ministry;
- the *Mercyhurst Magazine* is a periodic publication for all campus stakeholders: students, employees, and alumni, which features regular updates connected to mission;
- and the Carpe Diem Newsletter provides regular communication between Campus Ministry and alumni who have participated in the Carpe Diem Retreat programs.

Linking Mission to Planning

As detailed in the university’s previous MSCHE self-study, the current mission and core values were established and approved in 2007 after a highly collaborative, college-wide review process which resulted in statements that articulated more explicitly the university’s commitment to its Mercy heritage, liberal arts tradition, diverse and inclusive culture, and concern for student well-being. Highly stable, the mission and core values were reviewed and updated in 2012 to reflect the university’s transition to university status and in anticipation of a comprehensive review and revision of the university’s liberal core curriculum that led to the REACH core and the outREACH initiative. (S1.C1: Mission and Core Value 2012 Update) As documented in the committee minutes of both the mission subcommittee of the board of trustees and in the board’s general minutes at their February 2016 meeting, the new approach to the liberal core curriculum represented a significant rededication to the university mission and Catholic identity. (S1.C1: Mission BOT Subcommittee Minutes 02-2016) REACH was grounded strongly within a two-course commitment to Reason and Faith (the “R” in REACH) including courses from the Catholic Studies program as options for students to complete the requirement. Moreover, through the outREACH initiative, as detailed in Chapter 5, the university implemented a three-course graduation requirement focused on consistent reinforcement of the university mission and Mercy values through the integration of three specific student course experiences, each occurring at a different point of matriculation. (S1.C1: Undergraduate Catalog - REACH)

Review and renewal of the university mission and core values have been the central principles guiding the university in developing and implementing a successful approach to comprehensive strategic planning. Specifically, the 2018-2020 Strategic Plan, “Renewal through Mercy,” which was extended to 2021 due to the global pandemic, took as its starting point the need to align all strategic initiatives with the mission. Within the list of charges given to the Strategic Plan Steering Committee was the charge to reaffirm the mission. (S1.C1: 2018-2021 Strategic Plan Steering Committee Charge) Thorough and highly collaborative, the committee identified themes and objectives grounded in and consistent with the university mission, including renewing the commitment to a Mercy education, campus life, the university’s resources, processes and infrastructure, and Mercyhurst North East. Within these themes, the plan reflected critical connections to mission values through concrete objectives relating to, for example, supporting student success, reaching out to non-traditional

students, fostering diversity and inclusion, and improving health, safety, and well-being across the university communities. Further, the 2021-2024 Strategic Plan, “Mission Inspired, Future Ready,” approved and implemented in June 2021, presents objectives arranged around the categories of the core values of the university. Specifically, the goals in the plan are articulated through three initiatives identified as essential to fulfilling the mission and developed within a comprehensive evaluation of the university’s shared values, vision, and mission. For example, resonating with the university’s mission and core identity, the goal of being “Intellectually Creative” frames initiatives that reaffirm the centrality of the liberal arts, seek to ensure high quality programming in both academics and student life, and prioritize both the student experience and student success as critical to meeting the mission mandate. Within “Reflectively Aware,” the plan operationalizes the university’s mission and core values, focusing on holistic health and wellness, supporting equity, inclusion, and justice, and addressing support for the whole student experience as essential to fulfilling the university’s particular responsibility as an institution founded by the Sisters of Mercy. Finally, “Foundationally Secure,” frames initiatives around the university’s critical identity, recommitting to the Mercy identity, supporting the dignity and value of human connection and interactions in operations, and ensuring institutional health and sustainability as the university enters its next hundred years. “Mission Inspired, Future Ready” builds on the momentum of the university’s recommitment to mission over the past five years and guides the trajectory for continued success. (S1.C2: 2021-2024 Strategic Plan, S1.C3: 2021-2024 Strategic Plan)

As the foundation of the both the former and current strategic plans, the mission and core values are the driving forces in university planning. This connection between mission and planning is particularly evident in the extraordinary presence of mission values in the decision to close the North East campus and consolidate programming and services on the Erie campus. As illustrated in the Substantive Change document presented to MSCHE in early 2019, the university mission and mercy heritage were central to the deliberations conducted among senior leadership and the final decision made by the board of trustees to enact the consolidation. (S1.C1: Substantive Change for Closure of the North East Campus) First, the decision recognized the university’s mission-driven commitment to educating students in the Mercy tradition and to providing post-secondary education for capable learners who sought to learn job-entry skills. Moreover, the decision to conduct a phased transition to the Erie campus reaffirmed the university’s Sister of Mercy legacy by ensuring a seamless, high-quality student experience, particularly in the allied health programs. That commitment was further reinforced with the purchase and renovation of the Sisters of Mercy Motherhouse adjacent to the Erie campus to house Nursing programs starting in January 2022. Throughout the closure and consolidation process, the university has maintained its commitment to ethics, integrity, and open communication, particularly regarding the stakeholders most impacted by this change. The consolidation has greatly enhanced engagement between the professionals in the associate degree and certificate programs and the faculty and staff on the Erie campus. (S1.C1: North East Consolidation Announcement) In addition, the university has maintained close ties with the North East community toward ensuring that the property transitions into an asset, with an operating entity as committed to the North East community as Mercyhurst has been for the last three decades.

Ensuring Quality

In leadership and governance, the last five years evidence extraordinary commitment to university mission and goals. At all levels of governance, mission provides the centering principle around which the university’s critical leadership structures are framed, starting with the board of trustees. For example, the bylaws of the board of

trustees clearly establish the board as having primary oversight and governance of the university and designate university mission and purpose as the board's first responsibility. (S1.C1: Bylaws of Mercyhurst University; S1.C1: Mercyhurst University Trustee Charters). In addition, mission presence is further reinforced by the continued presence of the Sisters of Mercy on the board of trustees with the requirement that the membership of the board must include at least two members of the Institute of Sisters of Mercy of the Americas or lay individuals who have been designated by the Sisters as their representatives. Currently, two sisters serve on the board, one of them on the executive committee.

The primacy of mission in board operations can be demonstrated in many ways, both large and small. Simple but powerful practices provide critical mission focus, such as ending all meetings of the full board with a discussion/reflection on how the decisions of that meeting aided or challenged the Mercyhurst Mission or printing the full text of the mission on the name plates placed before each board member at every meeting. On a more formal level and in addition to the dedicated time for mission described above, the board's subcommittee on mission meets regularly and reports to the full board at every meeting, and all new members of the board serve on the mission subcommittee in their first year to ensure the centrality of mission in orientation and professional development. (S1.C1: Mission BOT Subcommittee Membership) Charged with ensuring that the mission is being accomplished, the mission subcommittee engages in regular discussions regarding faithfulness to religious sponsorship and, along with the board's subcommittee for governance, closely monitors the university's relationship with the CMHE. The mission subcommittee oversees the university's covenantal agreement with the CMHE and the links between this covenant and the university's bylaws and articles of incorporation. (S1.C1b: Mercyhurst University Trustee Charters p.X) The mission subcommittee also provides a critical link with other administrative bodies, including the Office of Mission Integration through the vice president for mission integration, who serves on the committee. The mission subcommittee is charged with periodically reviewing the university's mission, vision statements, and core values. For example, in February 2021, in advance of the June 2021 full board review and approval of the 2021-2024 Strategic Plan, the mission subcommittee conducted a formal review of the university mission and core values with full approval granted at the subsequent meeting of the full board (S1.C1 Mission BOT Subcommittee Minutes 02-2021). Moreover, through the Self-Study process, the mission subcommittee recognized the need for and proposed to the full board a more formalized process for Board of Trustee level review of the mission, vision, and core values. In recognition of the importance of regular review to ensure that planning and decision making were truly current and mission-centered, the board of trustees approved a revision to the mission subcommittee charter that outlined the review on a three-year cycle. (S1.C1 Mission BOT Subcommittee Minutes February 2021)

Also reinforcing mission is the primary administration of the university, conducted by the president and the president's cabinet, which consists of eight area vice presidents who meet weekly and manage the ongoing operation of the university. The vice president for mission serves on the cabinet, providing a weekly report on mission activities and initiatives and providing mission focus to discussions and decisions. (S1.C1: President's Cabinet Membership Profile; S1.C1: Mercyhurst University Cabinet Organizational Chart 2021-2022). The vice president for mission meets biweekly with the university president, ensuring the presence of a mission-focused perspective in administrative planning and decision-making. Other key areas in the university's shared governance model provide intersections between operations and mission commitment. For example, in their

respective handbooks and/or bylaws, the governance structures representing the three key university constituencies, faculty, students, and staff, ground themselves in the university mission and tie mission directly to their individual vision and goals. For example, in the Faculty Handbook, which includes substantive description of the university mission, vision and core values, the academic mission is “grounded in the values of the Mercy Mission,” and the academic goals resonate with the university mission’s commitment to the liberal arts, service learning, and civic engagement. (S1.C1: Faculty Handbook p.X, S1.C3: Faculty Handbook p.X) The bylaws of the Staff Senate specifically ground the organization’s mission in the university mission and centering of the student experience, focusing on “developmental activities that enhance the collegiate experience and culture for all our students.” (S1.C1: Staff Senate Bylaws p.1, S1.C3: Staff Senate Bylaws p.1) Framing the primacy of mission in governance most succinctly, yet perhaps most powerfully, is the preamble to the constitution of the Mercyhurst Student Government (MSG) which vows “to preserve, protect and defend the Mission of Mercyhurst University.” (S1.C1: Mercyhurst Student Government Constitution, S1.C3: Mercyhurst Student Government Constitution)

The subcommittees of the organizations within the university’s shared governance model also have an explicit connection to the university’s mission and core values. (S1.C1: Mercy Initiatives Overview, S1.C3: Mercy Initiatives Overview) Some examples include:

- the establishment of the Asperger’s/Autism Initiative (AIM) program at Mercyhurst;
- the Compensation Task Force, with a focus on “just and livable” wages for all employees;
- “Jeans for a Cause,” an on-going program through which employees contribute to a fund that supports mission- and Mercy-related causes and organizations, such as the House of Mercy, Emmaus Soup Kitchen, and the Erie Food Pantry;
- and the Mercy Market, a 2020 initiative to consolidate support for students struggling with food insecurity and other challenges through meal swipe sharing, clothing assistance, and funding for books.

Embedding Mission into the Student Experience

The mission and core values of Mercyhurst University are infused into the organization and supporting frameworks that constitute the identity and operations of Mercyhurst University. In no area is this mission and Mercy spirit more evident than in the programming and services supporting the experience of the Mercyhurst student. Captured in the motto *Carpe Diem*, the mission surrounds the students in nearly all aspects of academics and student life. For the students who study and live in it, the university is truly “Mercyworld.”

Academics

Under the direction of the vice president for academic affairs and the academic colleges through the college deans, and as the foundation of the student experience, the Office of Academic Affairs (OAA) plays a vital role in ensuring the university’s commitment to the mission, core values, and goals. The presence of mission in academic affairs can be felt in nearly all aspects of academic operations, from the OAA Mission and Vision Statements to the spirit of mission and Mercy in programs designed to support teaching and learning, such as the Keep Teaching initiative, which provided resources and support for classroom instructors responding to the challenges of converting almost overnight to remote instruction during the spring 2020 global pandemic lockdown. (S1.C3: OAA Mission and Vision Statement, S1.C3: Keep Teaching Guide)

At the structural level, the university maintains a clear focus on developing and supporting programming

operationalized two strategic goals, one for non-traditional students and one for community and national partnerships. With a particular focus on graduate students and veterans, this strategy was targeted toward making a Mercyhurst education accessible to students from all backgrounds, especially non-traditional students. Recognizing the need to reach students whose life circumstances might not allow for traditional on-campus matriculation, the university created the Office of Distance Learning (ODL) to focus on graduate online course development and improve accessibility through online and blended courses. (S1.C3: Office of Distance Learning Brochure) Other efforts, such as the university obtaining status as a “Purple Heart” university in 2018, further expanded accessibility to non-traditional students in line with the Mercyhurst mission. (S1.C3: Purple Heart Article) As one of two such institutions in Pennsylvania, the

In terms of mission ties to curricula, nearly half of the general education course requirements for degree completion are directly linked to university mission: two dedicated courses in REACH and four dedicated courses in the outREACH initiative. (S1.C1 Undergraduate Catalog - REACH; S1.C3: Undergraduate Catalog - REACH) In addition to the inclusion of Catholic studies courses in the Reason and Faith area that was described above, the university’s commitment to mission in the curriculum is strongly demonstrated through the outREACH initiative. Developed to deepen the mission focus within the university’s REACH general education curriculum, outREACH began with visioning a core curriculum model committed as much to demonstrating student learning in mission integration as to student learning in general education and academic programs. As an explicit commitment to mission through a defined set of student learning outcomes, outREACH represented a cutting-edge model for assessing mission integration in ways that could be measured and quantified. At the base of the outREACH assessment model were three essential questions relating to student learning in mission: are we providing a mission and mercy education; where are doing that and how; and most critical, are the students learning and how do we know? The university set out to get beyond describing to something that could be measured across time, something that could be a true assessment of actual student learning based on explicit experiences tied to articulated student learning outcomes. The concept of outREACH stands for the values articulated in the university mission and the call to service and commitment to others established by the Sisters of Mercy tradition, as well as the knowledge and skills consistent with the university vision and core values.

The courses within outREACH each have their own learning outcomes assessed within existing academic processes; however, the assessment initiative for student learning outcomes in mission integration layers in a particular reflection assignment that is assessed using a consistent rubric and evaluation process. In essence, outREACH measures student performance on a developmental scale in key learning criteria tied to understanding and applying mission-related skills and knowledge. In this way, outREACH provides quantitative data as to student achievement in learning outcomes relating to mission integration, including, for example, embracing diversity, listening to and learning from others, and engaging with service in the wider community, all values that lie at the core of a uniquely “Mercyhurst” education.’ (S1.C1 Undergraduate Catalog – REACH, S1.C3: Undergraduate Catalog – REACH).

In addition to the REACH and outREACH curriculum, the university demonstrates a strong commitment to

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Mission relevance, as well as adherence to university strategic planning goals, is fundamental to the existence and operations of critical academic support areas, such as the office of academic support, learning differences, and the AIM programs. Under the direction of the associate vice president for academic services and support, the academic support and learning differences programs, as part of their mission, “

(S1.C3 Academic Services and Support Mission Statement) For example, resonating strongly with the university mission, the AIM program offers support and special career readiness opportunities for academically successful students on the autism spectrum. (S1.C3 AIM Mission Statement)

- The Evelyn Lincoln Institute for Ethics and Society (ELIES), highlighting the breadth and depth of the university’s Catholic intellectual tradition, offers public lectures and panel discussions on various contemporary ethical issues and coordinates with the community through projects, such as partnering with local Rotary members to invite local high school juniors to campus for a day-long conference of presentations and discussions about ethics.
- The William C. Sennett Institute for Mercy & Catholic Studies focuses on innovative efforts to enhance the mission of Mercyhurst University through events, such as the annual fall lecture addressing significant topics in Catholic theology and thought and the biannual spring lecture featuring Mercyhurst alumnae Sr. Joan Chittister, OSB and a conversation partner.
- Mercyhurst Institute for Arts & Culture (MIAC)

Angélique Kidjo’s “Artist as Activist: A Passion for Freedom and Social Justice” (Oct. 2020) and “An Evening with Sean Astin” in which Mr. Astin shared his work to destigmatize mental illness and promote neurodiversity and inclusivity (March 2021).

he vital connections between mission and academics are also evidenced in the strong mission links built into all areas of assessment. As detailed in Chapter 3, all university academic departments are required to reflect upon

and explicitly articulate mission-relevance in specific departmental mission statements. (S1.C3 Five Year Self Study Guide)

Beyond the Classroom

Always a university priority, the presence of university mission and goals in supporting the student experience has become increasingly explicit and evident since the implementation of the 2018-2021 Strategic Plan. Three specific undertakings demonstrate the university's strategic efforts to ensure a mission-infused student experience beyond academics: a substantive commitment to supporting students, particularly in the areas of diversity and inclusion and non-traditional students; a focused plan for infrastructure improvement in support of campus life; and efforts to provide high-quality resources to improve university operations.

As detailed in Chapter 6, an explicit connection between mission and operations grounds all university units in support the student experience. Departments in these areas have mission statements tied directly to the university mission and core values. Departments are required to participate in evaluation processes that contextualize operations and decision-making within the mission and the strategic goals of the university and participate in assessment both annually and as part of the (S1.C3: Assessment Handbook, S1.C4: Assessment Handbook) Moreover, recognizing the importance of learning that takes place outside of the classroom, the university provides a full range of resources, support structures, and professional services to create a campus environment in which its students can thrive. University units that support the student experience prioritize mission relevance in providing for student's social, emotional, and spiritual well-being. For example:

- the Student Outreach Committee (SOC) provides wrap-around support for students who are struggling in various ways, though a university-wide referral system;
- Campus Ministry serves
- the Bystander Committee, which emerged from the 2014-2015 KEY (Knowledge Empowers You) initiative addresses sexual assault and educational programs along with resources obtained through the institution's "It's On Us" grant, which draws together various departments to review and develop programming and ongoing education for students toward building cultures of responsibility and courage to stand up for those who are vulnerable while combatting sexual assault.

Mission is also strongly evident in the university's explicit commitment to supporting diversity and inclusion and non-traditional students. For example, the Diversity and Inclusion Task Force was established in 2016 as part of the administration's commitment to mission renewal. Resonating with inclusion as essential to mission, the task force focuses on developing platforms and strategies to foster a diverse and inclusive campus culture through direct policy changes, such as gender-neutral bathrooms and ADA compliance, and programming, such as supporting campus groups in hosting speakers on topics connected to diversity. Other evidence of mission in supporting diversity and inclusion can be found in the various new employees' orientation processes, which regularly include introductions to working with a culturally and racially diverse student body and Title IX information sessions. (S1.C3 Diversity and Inclusion Task Force Charge)

Recognizing the mission imperative to establish a campus environment that fosters human dignity and provides care and support for both individuals and the community, the university is committed to continuous improvement in administrative support resources and support. Examples of institutional initiatives that allow for an explicitly mission-centered operation include:

- significant investment in technology updates across administration offices with particular focus on the student experience, including new software and technology systems for enrollment, student financial services (SFS), residence life, police and safety, and athletics;
- reporting systems focused on providing more efficient processes to improve day-to-day operations and functionality for staff and administration, including improved data access and analytics, such as automated budget reports for vice presidents, deans, and budget directors;
- improvements to the Human Resources area, such as updated processes for hiring, employee orientation, employee evaluation, benefits, time entry, and reporting, which were essential when COVID-19 created intense pressure for employees coping with the personal and professional challenges of work-life balance amidst a global pandemic.

Finally, it is critical to note that all institutional plans for improvements in construction, renovations, and new processes in technology systems are aligned with the educational and institutional goals within the university's strategic planning processes and thus, the mission.

COVID-19

The university's response to the challenges of the global pandemic is grounded firmly in its mission and core

S1.C1

Amidst

Covid-19, the university demonstrated its pastoral concern for students through an effort to reach out personally to every undergraduate student in the "Spring 2020 Student Connection" initiative. (S1.C1: Spring 2020 Student Connection Summary, S1.C3: Spring 2020 Student Connection Summary) Nearly 70 university

employees made phone calls followed by (if necessary) email outreaches to over 1,700 students. In true Mercy fashion, while student concerns were documented and referrals made as needed, the goal of the initiative was to establish personal contact with each student and to inquire about their well-being and the well-being of their family.

Key Findings

- The university demonstrates a clear commitment to on-going mission renewal through the explicit presence of mission, core values, and Mercy heritage in all aspects of operations, particularly in the previous and current university strategic plans. Embraced by stakeholders from the board of trustees to administration, staff, faculty, students, the mission, core values, and Mercy heritage are present in the daily lives of the university community in countless ways, such as the Mercy Emissaries program, Mercy Week, and Mass of the Holy Spirit.
- The innovative outREACH initiative builds on the university's already vigorous expression of student learning in university mission, core values, and Sisters of Mercy heritage within general education and academic curricula and provides invaluable assessment of mission and Mercy integration over the four-year undergraduate matriculation.
- The university has affirmed its identity as a Catholic university in the liberal arts tradition founded by the Sisters of Mercy through deeper ties with the Conference on Mercy Higher Education and a robust commitment to mission in corporate governance through, for example, the Mission Committee of the Board of Trustees and the cabinet level service by the vice president for mission.
- Through focused attention to diversity, inclusion, and opportunity for non-traditional student populations, the university strives to fulfil promise of the mission and honor the legacy of the Sisters of Mercy.

Opportunities for Improvement and Innovation

1. It is recommended that the university continue its current efforts toward operationalizing assessment for the remaining non-academic programs that need to come on board, creating a process for documenting mission impact on decision-making, particularly in resource allocation.
2. It is recommended that the university continue its efforts, as resources allow, to revitalize and enhance programs and support structures consistent with its Sisters of Mercy heritage, such as compensation, support for student and faculty scholarly and creative inquiry, and environmental sustainability.

Chapter 4: Standard II – Ethics and Integrity

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

Overview

Mercyhurst University meets the requirements of Standard II. A full description of the ways Mercyhurst University meets the nine criteria and all applicable sub-criteria of Standard II, as well as the Requirements of Affiliation 1, 2, 5, 6, and 14, are presented throughout this chapter.

Ethics and integrity are essential to the fabric of effective higher education institutions. Mercyhurst University adheres to these core values operating in an ethical and responsible manner throughout its interactions with students, employees, and the external community. The university's dedication to the principles of ethics and integrity are evident in its published documents, particularly the Faculty Handbook, Employee Handbook and Course Catalog, which are updated annually and easily accessible online through the university Hub, and through numerous policies, actions, and procedures that evidence the university's commitment, grounded in its mission and Mercy heritage, to ensuring academic freedom, fostering a climate of respect on the campus community among all constituents, working to resolve differences in a fair and impartial manner, avoiding conflicts of interest by employees and the administration, maintaining honesty and accuracy in all internal and external messaging, and reporting all required information to federal, state, and accrediting bodies in an accurate and timely manner.

Ensuring a Culture of Academic Freedom

According to the American Federation of Teachers, "Academic freedom is the right of faculty members, acting both as individuals and as a collective, to determine without outside interference: (1) the college curriculum; (2) course content; (3) teaching; (4) student evaluation; and (5) the conduct of scholarly inquiry." Using this schematic definition, Mercyhurst University demonstrates clear commitment to academic freedom as a core element in the educational experience. The university Faculty Handbook opens with an unambiguous declaration that the university adheres to the "Statement of Principles on Academic Freedom and Tenure," issued by American Association of University Professors in 1940. (S2:C1: Faculty Handbook p.i) Moreover, the university operationalizes that commitment by ensuring that faculty contribute regularly, freely, and significantly to the formation and reformation of the university's liberal arts core curriculum and the curriculum of its various departments and programs and their respective majors and minors. Section IV part B of the Faculty Handbook identifies as a critical role of the faculty "leadership in the educational mission of the university." The role of the faculty in initiating, reviewing, and recommending curriculum and related policies is further secured in two critical ways. (S2.C1: Faculty Handbook p.X)

First, as detailed in the Faculty Handbook, faculty exercise direct influence over the curriculum through committees charged with curricular review and recommendation. The Academic Planning and Assessment Committee (APAC), a standing committee of the Faculty Senate, is charged in part with reviewing and recommending policies specifically relating to "the curriculum, including the periodic review of the goals, course selection criteria, competency/course requirements, capabilities and course areas of the REACH curriculum,

majors, minors, developmental programs and physical development” as well as academic assessment. (S2.C1: Faculty Handbook p.X) The Core Curriculum Advisory Committee (CCAC) “assists the Office of Academic Affairs (OAA) in developing, implementing, and evaluating the core curriculum, including for example, review and recommendations with regard to the REACH curriculum, iMU, Beyond the Gates, and the senior ethics capstone.” (S2.C1: Faculty Handbook p.X) Second, direct faculty influence on the curriculum is further ensured by the university’s processes, which originate at the academic departmental level, for proposing new programs and courses, as well as revisions to existing programs and courses. Within these processes, such as New Program Approval Application and the New Course Approval Form, faculty assume the primary role in curriculum, initiating curricular proposals grounded in the mission and university strategic planning, as well as other critical factors, such as curricular consistency, program assessment and curriculum mapping, needs analysis, and revenue projections. Conducted largely online, curricular development and changes progress from faculty to approval through the department chair to the college dean to the office of institutional effectiveness to the vice president for academic affairs. (S2:C1: New Program Application; S2.C1: New Course Approval Form)

One example of the university’s commitment to strong faculty influence in the curriculum is the core revision that resulted in the REACH and outREACH core curricular model. This process was conducted by a faculty-led Liberal Arts Core Revision Committee working alongside what was then the Office of the Provost, which provided coordination between departments. The committee submitted its recommendations to APAC. REACH and outREACH were subsequently approved by the Faculty Senate and recommended to the president and the board of trustees. (S2.C1 REACH Development Summary) As another example of the faculty’s significant influence in curriculum development, the faculty members in the Nursing program brought forward a proposal to create a new pre-licensure program at the 4-year BSN level. Because this program required both internal and external stakeholder review and approval, the department members played a pivotal role in creating a timeline for development, submission, and implementation. (S2.C1 4-Year BSN Timeline)

Clear evidence of the university’s commitment to academic freedom, as the central role faculty play in curriculum, can also be found in assessment planning and implementation processes. Faculty determine course learning outcomes and their related importance, as well as define the levels of student achievement and the measurement and assessment of that achievement. For example, Program Assessment Plans and Curriculum Maps are developed by the faculty in the respective departments, and departmental faculty review assessment processes through the five-year self-study cycles. (S2.C1 Assessment Handbook) Further, departments provide the critical information underpinning course assessment through the IDEA student evaluation platform, determining for each course in the curriculum not only the learning outcomes for that course, but also the priority assigned to each selected student learning outcome, designating, for example, some as “essential” and others as “important.” In this way, faculty play a vital role not only in curricular assessment, but also in the assessment of themselves in the implementation of curriculum. The academic departments, and by extension faculty, oversee and develop the academic information that appears on public-facing sites, such as the university catalog or website. As evidenced by range and depth of intellectual diversity displayed in the Syllabus Repository, faculty are empowered to determine and employ the teaching philosophies and methodologies they think best suited to carry out their professional responsibilities in the classroom. (S2.C1 Syllabus Samples)

Finally, academic freedom is promoted through faculty scholarship and research. Each year, scholarly inquiry is celebrated at the end of the academic year through the “Celebration of Scholars” (faculty scholarship) and the

“Illumination” (student scholarship) publications and events. (S2.C1: Celebration of Scholars 2021 Program S2.C1: Illumination 2019 Program) Additionally, when engaging in scholarship that involves human subjects, faculty and student scholars complete Institutional Review Board (IRB) applications which are submitted to the IRB committee for review. (S2.C1: IRB Research Proposal Form) The IRB committee, which is appointed and confirmed annually by the Faculty Senate, ensures professional faculty oversight of research, particularly regarding the protection of human subjects whenever research includes such participation. The university also demonstrates respect for faculty research and scholarship through a clear articulation of policies. Two examples include the Section V of the Faculty Handbook, which details university policy relating to faculty research, and the Course Development agreement utilized by the Office of Distance Learning, which clarifies course development in the context of faculty-directed course construction and ownership of course materials. (S2.C1: Faculty Handbook p.X, S2.C1: ODL Course Development Agreement).

Creating a Climate of Respect

The university is committed to a campus climate that promotes respect and understanding among students, staff, faculty, and administration, through inclusive policies, practices, and programs that encourage respect, integrity, and creativity in a supportive academic environment in which diverse experiences, ideas, and perspectives are recognized. For example, the university’s non-discrimination policy and Title IX policies and procedures are clearly articulated and accessible to the university community through the Employee Handbook, Faculty Handbook, and Student Handbook, as well as on the university website, under “Policies and Compliance.” (S2.C2: Employee Handbook p.X, S2.C2: Employee Handbook p.X, S2.C2: Faculty Handbook p.X, S2.C2: Faculty Handbook p.X, S2.C2: Student Handbook p.X, S2.C2: Student Handbook p.X) In addition, to ensure that students, employees, and faculty from diverse backgrounds feel welcome to apply to study and work on the campus, the Office of Human Resources includes the university’s non-discrimination policy on every employment position posted both internally and externally.

Furthering efforts to create a climate of respect and consistent with initiatives outlined in the 2018-2021 strategic plan, the university has taken significant action over the past several years to target resources and programming in support of diversity and inclusion as central to the mission and core values. Targeted focus within the previous strategic plan has resulted in significant programmatic development, including the establishment of the Multicultural Activities Council (MAC) and the creation of a Diversity and Inclusion Coordinator position within the Campus Involvement Center (CIC) to ensure that students from diverse cultures, races, ethnicities, genders, and sexualities have their needs and interests represented in student programming and events. (S2.C2: Diversity and Inclusion Task Force Charge) In 2020, the university added the position of Officer for Equity, Inclusion, and Justice, currently held by a Sister of Mercy, who regularly attends recognized student club and organization meetings, such as the Black Students for Unity group. Diversity and inclusion staff focus on programming and pastoral presence as essential supports for students who might otherwise feel marginalized on campus. In addition, the university evidences its commitment through focused diversity and inclusion staff programming, such as the LGBTQIA Allies Program. Founded by university chaplain Fr. James Piszker, the LGBTQIA Allies Program offers information and training to help employees understand and support students who identify across the range of sexuality and gender diversities. Since its inception in 2012, over 120 employees have completed the program, which has matured to include deeper conversations and continued

learning, especially regarding the complexities of gender identity. Similar trainings have been offered to student leaders as well, including residence assistants. (S2.C2: LGBTQIA Allies Program Overview)

The university also recognizes that a commitment to diversity and inclusion must also respect class and poverty as essential experience dividers, especially on college campuses. In response, the university offers a range of services for those who may be struggling financially. For example, inaugurated in 2020, the Mercy Market, which is overseen by the Office of Community Engagement, assists students who struggle to find sufficient financial resources for basic college necessities. The Mercy Market provides, through a designated site on the university Hub, information about and access to various resources available to struggling students, including: the Emergency Book Fund, which supports the purchase of textbooks for eligible students; the MU Pantry and Swipe Out Hunger, which provide grocery staples and dining hall swipe sharing for students facing food insecurity; Book Swap, which coordinates students in sharing and reusing textbooks; and the Professional Clothing Closet, an initiative that offers free clothing for students as they prepare for job interviews and professional work settings. (S2.C2: Mercy Market Overview)

As a mission-centered university in the Catholic tradition, Mercyhurst draws upon a range of support units in ensuring a respectful, inclusive, and welcoming campus environment. Campus Ministry, which supports all faith traditions through a strict anti-proselytizing policy, works to create a hospitable environment for the spiritual development of the university community through a variety of different initiatives. From devotion and fellowship activities to the commuter student ministry to the 4th Vow and Carpe Diem Retreats, Campus Ministry embraces the diversity of student experiences to fulfill its mission to create a hospitable environment and a locus for spiritual development of the entire university community. (S2.C2: Campus Ministry Events Summary) In addition, the Evelyn Lincoln Institute for Ethics & Society (ELIES), established in 2008, works to raise awareness of ethical issues that confront people in their social and professional lives. Events hosted by ELIES include: a student symposium in 2018 entitled "What are the moral implications for failing to respond to environmental problems?"; a faculty panel discussion in 2019 entitled "The Berlin Wall: 30 Years Later,"; and a 2020 guest lecture by Danielle McGuire entitled "Rey Taylor, Rosa Parks, and the Radical Roots of #MeToo.," in 2020. (S2.C2: Evelyn Lincoln Institute Summary Report 2021) As another example, the Multicultural Student Services (MSS), under the direction of the Multicultural & Inclusion Coordinator, assists with the educational, cultural, social, and personal needs of all students, with special emphasis on ethnicity, gender, and minority issues. The center sponsors numerous opportunities for the campus community to engage with diversity and inclusion as university values, such as leadership and diversity Workshops, Hispanic/Native American Heritage Month Celebrations, Black/Women's History Month events, "Unity Week," and the annual Multicultural Graduation Ceremony. (S2.C2: Multicultural Student Services Events Summary)

Honoring the Dignity of Work

Grievances

Consistent with the mission commitment to an appreciation of the dignity of work, the university is committed to establishing and implementing fair and impartial policies that address complaints or grievances raised by all members of the university community and to ensuring that concerns are heard and addressed appropriately and equitably. For example, the Student Grievance Policy is clearly articulated in the Student Handbook and published on the university website under the "Student Consumer Information." (S2.C3: Student Handbook p.X)

The policy on the Student Consumer Information page outlines who to contact with complaints and how the grievance is progressed in seeking resolution. A useful one-stop student resource, the Student Consumer Information page lists policies and procedures relating to numerous student concerns, including housing, financial aid/billing, disability services, sexual or gender-based misconduct, and discrimination or harassment. For example, in the case of a grade concern, the student grievance policy directs that the student first addresses the concern with the instructor. If resolution is not possible, the grievance moves to the department chair then to the dean and finally to the vice president for academic affairs. In addition, (S2.C3: Student Consumer Information Website)

Employee grievance policies and procedures are addressed in two documents. The Employee Handbook, located under Human Resources on the Hub, details general HR policies and procedures applying to all employees. The employee grievance policy outlines the steps employees follow to address grievance concerns, starting with the immediate supervisor. (S2.C3: Employee Handbook p.X) If the issue is not resolved, the employee progresses the complaint to the person next highest in the administrative chain of command, followed by Office Human Resources and the area vice president. The procedure clearly indicates that no discriminatory or disciplinary action will be taken against any employee for using the problem-solving procedure. Similarly, the Faculty Handbook, located on the Office of Academic Affairs' Hub site, contains the faculty grievance policy, which outlines the steps faculty members follow in case of grievance, starting with the faculty member's department chair, progressing to dean and then to the vice president for academic affairs, who consults with the Office of Human Resources as needed. (S2.C3: Faculty Handbook p.X) Section V of the Faculty Handbook also contains specific policies regarding grievances related to termination, reappointment, and dismissal for cause, as well as within the tenure and/or promotion processes.

Conflict of Interest

In fostering an environment that honors the dignity of work, Mercyhurst is committed to the avoidance of conflict of interest and/or the appearance of such conflict in all activities and among all constituents, as demonstrated by the policies and procedures found in various resources. For example, all members of the board of trustees sign both a conflict of interest disclosure statement and confidentiality agreement. (S2.C4: BOT Conflict of Interest Disclosure Statement; S2.C4: BOT Confidentiality Agreement) These forms are reviewed annually before members sign and submit their forms to the Office of the President. Conflict of Interest disclosure for employees is managed by the Human Resources Office, which includes the collection and processing, as appropriate, of conflict-of-interest statements from institutional employees and representatives. The Human Resources office consults with the Office of Academic Affairs, as appropriate, to review conflict of interest disclosures and any related concerns for employees in the academic units. For example, as detailed in the Faculty Handbook under "Annual Disclosure of Conflict of Interest," faculty are expected to disclose in writing by the first week of each semester "all the significant financial interests and other opportunities for tangible personal benefit" that are related to the faculty member's institutional responsibilities. (S2.C4: Faculty Handbook p.X) The policy stipulates that faculty are to provide any information necessary for the university to review, manage, and resolve any conflicts of interest. If it is determined that that a conflict of interest exists, the Office of the General Counsel and the Office of Academic Affairs are charged with developing a written plan to resolve or manage the conflict of interest. For example, the Faculty Senate has referenced the conflict of interest policy to guide the replacement of a member of the Rank and Tenure Committee in order mitigate any

potential conflict of interest posed if a sitting member of the Rank and Tenure Committee is also undergoing review within the Rank and Tenure process. (S2.C4: Rank & Tenure Committee Replacement Summary) Another example of the conflict of interest policy in effective use occurred during the recent presidential search process when a member of the Presidential Search Committee who was promoted to an upper administration position was replaced to avoid any potential conflict of interest that may have arisen should the person remained on the search committee. (S2.C4: 2021 Presidential Search Committee) Other examples of the university's engagement in this area include the regular legal and risk analyses processes in the Office of the General Counsel, and the designated phone line and voicemail for whistleblower complaints that is monitored weekly.

Fair and Impartial Employment Practices

Through the Employee Handbook, the university provides detailed information to all employees about policies and procedures meant to ensure fair and equitable practices in employment matters and to foster a positive work environment consistent with the university's core values. Section 2 of the Employee Handbook specifically addresses key policies relating to employment, such as policies relating to disciplinary action, performance evaluation, and personnel records. One example of a unique approach is the "Problem-Solving Procedure," aimed at providing employees who feel they have been treated unfairly with a process for addressing their concerns. (S2.C5: Employee Handbook p.X) Another example is a clearly articulated policy for employment termination that outlines procedures for voluntary and involuntary termination with specific attention to the use of the problem-solving procedures for employees who question the fairness of a termination for cause decision. (S2.C5: Employee Handbook p.X) Moreover, to ensure transparency, upon termination, whether it is voluntary or involuntary, the employee participates in an exit interview with the Human Resource Department.

As an equal opportunity employer, Mercyhurst University maintains fair and impartial hiring practices that prohibit discrimination in admissions, recruitment, and employment. As noted above, the university's non-discrimination policy is included on every employment position posted both internally and externally. (S2.C5: Job Listing Sample) Job listings are posted on the Human Resources site on the Hub. To ensure consistency, all departments at the university follow the same procedure when seeking permission to create a new position. As detailed on the Personnel Requisition Form (PRF), approval to hire is granted through a process that flows from the department through the area vice president to the cabinet budget team. (S2.C5: Personnel Requisition Form, S2.C5: Cabinet Budget Transfer Memo) Once approved, the position job description is posted on the internal website for ten days, as well as on the external website when requested. Staff in the Human Resource department collect the resumes and make them readily available to the hiring committee for the position. The hiring committee conducts interviews. The committee then submits a recommendation to the area vice president. Before any offer is made, a Personnel Action Form (PAF) must be completed with final approval granted through the area vice presidents in consultation with the president. (S2.C5: Personnel Action Form) For internal positions, current employees are permitted to apply for positions leading to promotion within the organization. Current employees submit resumes to the Human Resource department, which forwards the resumes to the hiring committee. The hiring committee conducts interviews and submits its recommendation to the area vice president, following the procedures outlined above. While consistent with general hiring processes, faculty hires involve additional layers of consultation and review that are overviewed in Section V part F of the Faculty Handbook and detailed in the Hiring Guidelines provided by the Office of Academic Affairs. (S2.C5: Faculty Handbook p.X, S2.C5: Faculty Hiring Guidelines) For example, relevant to ensuring fair and

impartial hiring practices, the guidelines set requirements for membership of the search committee to include not only representatives from the hiring department, but also representation from another department in the college and, when possible, student representation. The vice president for mission is generally included in all faculty hiring processes, and all candidates meet with the vice president for academic affairs.

Maintaining Honesty and Truthfulness in Public Communications

Mercyhurst is committed to demonstrating honesty and truthfulness in public relations announcements, advertisements, recruiting and admission materials and practices, as well as in internal communications. In outlining how information is to be communicated to internal and external audiences, the marketing department's Brand Guidelines provide an apt expression of this commitment, emphasizing authenticity as the primary goal in stating, "We're genuine and sincere. We tell the story and communicate transparently. We back up assertions with facts and speak frankly." (S2.C6: University Branding Standards) In addition to open and honest communication via university publications, such as the Tide (formerly the Buzz) and the Mercyhurst Magazine, as well as regular email updates on critical concerns, such as the regular updates from the interim president on the presidential search process, the university holds regular gatherings of the community to share information and respond to questions. (S2.C6: University Communications Samples) As another example, the president gives an address at the beginning of each academic year to update faculty, staff, and administration on the state of the university. In addition, the faculty senate schedules forums on key issues and invites the president and/or vice president for academic affairs to address the community on key issues. Both the president and the vice president for academic affairs meet regularly with students through their representatives on the Mercyhurst Student Government and through scheduled forums all students can attend.

The university's commitment to authenticity is further evidenced in how the university approaches sensitive public communications. For example, when the university announced the consolidation of the North East campus, university officials were diligent in their efforts to be open and honest about the eventual consolidation of the North East campus, recognizing what this would mean for student populations, employees, and the town of North East, Pennsylvania. University vice presidents met individually with community stakeholders and spoke directly to the regional community through local news (TV and print). The university created and updated a designated webpage to explain the decision, walk the public through the process, and provide details on how the decision would affect current and prospective students. (S2.C6: Mission Inspired Future Ready Website)

Another example of transparency in communications occurred in fall 2020 when an unexpected spike in COVID-19 cases on campus stemming from athletics teams prompted the university to move to a remote mode of course delivery and instruction. From the start of the pandemic, Mercyhurst maintained a commitment to being as forthcoming, if not more so, than other universities in explaining the numbers of active positive cases among students and employees and to providing detailed information on the numbers of students in quarantine at any given time (whether through close contact with a positive individual or because of travel). When the infection numbers spiked in late October and early November 2020, a university-wide email was posted for public review on the university's COVID-19 webpage, and the vice president for student life was made available for comment on the situation and how the university was responding. (S2.C6: Resilience & Resolve Website) Emphasizing transparency and committed to clear communication of the facts, the university provided a thorough explanation of what appeared to have happened (student-athletes contracted the virus at an off-campus

gathering), how they were discovered (routine testing of student-athletes), and what it meant for the community, for example, the need for contact tracing and extra precautions and the transition to remote learning. Throughout, the university strove for honesty, clarity, and transparency in communications with both the campus and regional communities.

In the area of advertisement and admissions, the marketing department's Branding Standards Manual also demonstrates the university's commitment to transparency and data-driven accuracy in information. For example, in recruitment marketing, assertions about academic programs and student outcomes are supported by data and analysis. All academic-specific material comes from departments themselves (via the course catalog or university website), and public-facing sites are kept as up to date as possible, reflecting current curricula standards, faculty, and recent student successes. (S2.C6: Physician Assistant Program Website) Finally, as the often "first face" of Mercyhurst for potential new students visiting the campus for the first time, student Ambassadors are rigorously trained to ensure they are providing the most accurate information possible about the university to prospective students and families during visits. (S2.C6: Mercyhurst Student Ambassador Training Materials)

Demonstrating Mission Integrity in Affordability and Student Financial Knowledge & Acuity

Mercyhurst's mission grounds its actions in educating students whose choices will "enable them to realize the human and spiritual values embedded in everyday realities and to exercise leadership in service toward a just world." Moreover, through its core values, the university seeks to be "reflectively aware," dedicated to fostering an environment that "

promote affordability and accessibility to prospective and current students through various policies, practices, and programs that are made available to all.

Affordability

Recognizing the need to ensure affordability and in line with the Mercy mission to education all students, Mercyhurst University is committed to a variety of programs that reduce student investment. This commitment begins with resources to help students and their families complete the FAFSA process, which is required for all institutional aid, and continues through awarding of financial aid and management of payment plan options for outstanding balances through a partnership with NelNet/TMS.

One way that Mercyhurst ensures the affordability is through purposefully designed billing structures. Operating on a flat-rate billing model allows students to take between twelve and eighteen credits per semester as part of the standard rate, thereby increasing flexibility for students. In addition, with affordability in mind, the design of the REACH core curriculum ensures a robust liberal arts foundation for students without overburdening educational requirements. Finally, the university offers several options for students to receive credit for life experience and prior learning, such as advanced placement credits, facilitating reduced cost through reduced time to graduation. Through these mechanisms, the university actively assists students with an on-time graduation, thereby reducing the overall cost of attendance. In addition, reduced tuition rates are extended to students in populations central to the Mercy mission, such as local high school student affiliates, associate degree students, veterans, and adult students. Further evidence of the university's commitment to supporting affordability can be found in the range of housing and board options for students. The university recognizes the considerable cost burden involved in room and board and works to provide various levels of living and dining

arrangements to maximize flexibility and promote savings. In addition, as described above, the university supports a variety of programs for students who need additional resources, such as the Book Swap, Swipe Out Hunger, and other resources provided in the Mercy Market.

Finally, the university provides a range of opportunities to support students in funding higher education. For example, the university assists students financially by supporting federal and institutional work study programs in which students qualify for federal aid due to personal and family financial situations. Students also can earn money on campus by applying for institutional work-study programs. (S2.C7: Work Study Program Documentation) In addition, the Alumni Office focuses on raising funds for the Student Scholarship program. (S2.C7: Student Scholarship Program Overview) Through this program, donors help support financial aid and current-use scholarships directly available to Mercyhurst students. This program is critical in supporting students of all backgrounds to access higher education and afford a Mercyhurst education, including first generation students, single-parent families, and Erie community students. In 2021-2022 alone, the university awarded approximately \$34.8 million dollars of direct student aid.

Table 2 Financial Aid Distribution Summary for 2021-2022 Academic Year

Award Type	Total Funds	% of total
Federal Grants	\$6,700,338	6%
State Grants & Scholarships	\$2,878,942	3%
Institutional Aid, all types	\$64,311,810	58%
Outside Scholarships	\$1,425,214	1%
Work Study Programs	\$805,755	1%
Loans	\$34,833,484	31%

Student Financial Knowledge & Acuity

University admissions prioritizes transparency in communicating information about financial aid and scholarships to students and their families. Admission materials present current and accurate tuition and room/board amounts to prospective students. (S2.C7: Financial Aid Admissions Materials) Student admission visits include options for focused meetings with students and families about the financial aid process. (S2.C7: Admissions Visit Agenda Sample) As part of the accepted student admission packet, students receive detailed information about the preliminary financial aid offer that breaks down what each number in the offer means to ensure transparency on scholarships versus loans. (S2.C7: Preliminary Financial Aid Offer Sample) Admissions counselors and student financial services counselors consult frequently with students and families online and by phone, as well as in person during campus visits. In addition, admitted students are provided access to an online appointment scheduling platform which allows them to schedule meetings to address any questions relating to admissions and enrollment, including financial aid. (S2.C7: Student Financial Services Scheduling Platform) All students are assigned a student financial services (SFS) counselor to whom they can address any concerns regarding billing, loans, payments, or other financial questions, and students can schedule to meet with their assigned SFS counselor through the university Hub. Students are also provided a net price calculator on the university website to assist them in understanding more clearly the true cost of their education. This calculator is intended to provide estimated net price information, which is defined as the estimated cost of attendance (including tuition and required fees, books and supplies, room and board, and other related expenses) minus

estimated grant and scholarship aid to current and prospective students and their families based on what similar students paid in a previous year. (S2.C7: Net Price Calculator)

To ensure that students are provided with accessible and accurate information critical to their understanding of finances, the undergraduate and graduate course catalogs provide a full breakdown of tuition, fees, room and board, loan and grant education, the financial aid awarding process, campus amenities, SFS calendar and procedures, and enrollment requirements. (S2.C7: Undergraduate Catalog – Student Financial Services, S2.C7: Graduate Catalog – Student Financial Services) In addition, the financial aid webpages (internally on the Hub and externally on the university’s website) also provide information on federal, state, and external scholarship opportunities, including information about state, federal, and private funding sources and university scholarships based on academic merit, financial need, and athletic and artistic performance. (S2.C7: Student Financial Services Hub Site, S2.C7: Student Financial Services Website) Students are also provided information about scholarship criteria and parameters, such as renewability and GPA minimum requirements. To support students in managing student debt, students are required to take the Entrance Loan Interview provided by the federal government prior to taking out a loan. Students are also required to complete an Exit Loan Interview prior to graduation. (S2.C7: Entrance and Exit Loan Interviews) In addition, students are made aware of alternative methods to repay student loans through post-graduate service programs, such as AmeriCorps. Finally, also in support of student financial knowledge and acuity, all first-year students are required to take a two-semester course entitled iMU, an introductory class designed to offer students a better understanding of college life and the university. Within that experience, financial aid is a required iMU 101 syllabus content area, with emphasis placed on increasing student understanding the value of their education, both holistically and financially. (S2.C7: iMU Syllabus Sample)

Meeting Compliance Requirements

There are multiple documents that demonstrate university compliance with all reporting requirements for applicable federal, state, and Commission reporting policies, regulations, and requirements. For example, the university makes accessible to the general public a full disclosure of current information on institution-wide assessments, graduation, retention, certification and licensure or licensing board pass rates through a variety of sites. The Student Consumer Information site provides links to several different applicable sources of information, including the Student’s Right-to-Know Act Information and College Navigator sites, graduation rates, licensing and accreditation, and retention rates. (S2.C8: Student Consumer Information Website) In the area of assessment, the external website presents the Assessment and Planning page, which includes information about university strategic planning, institutional research, and compliance. In addition, the Accreditation landing page provides a listing of all the accreditations at the university for each program, as well as related contact information for each agency. (S2.C8: Institutional Effectiveness Website)

The university also demonstrates compliance as it relates to the various reporting requirements by the federal and state governments as well as other agencies. For example, the university submits on an annual or scheduled cycle for assessment, numerous reports, statistics, surveys, and self-studies that provide public external reporting of critical operations data, including but not limited to audit reports, the Clery Report, graduation reports, licensure, and certification pass rates, departmental accreditation self-studies, the NCAA academic success rate, PDE Assurance of Compliance, and the Student Right to Know Act information. These reports,

which are updated and disclosed in a timely manner, are prepared in a comprehensive and collaborative approach engaging the Offices of Academic Affairs, Enrollment Management, Assessment and Planning Department-Institutional Research, Student Financial Services, and Admissions, among others.

In addition to meeting the external compliance requirements, Mercyhurst remains committed to meeting the Middle States Commission on Higher Education (MSCHE) Requirements of Affiliation, standards, and policies. As highlighted throughout this self-study report, the university maintains compliance with all *Requirements of Affiliation*. Examples of how the institution demonstrates compliance with MSCHE processes and policies include:

- timely submission of routine reporting requirements such as the Annual Institutional Update and participation in the Mid-Point Peer Review process, coordinated through the Office for Institutional Effectiveness (OIE);
- ongoing monitoring of proposed and accepted updates to MSCHE Policies to ensure ongoing compliance at all levels, coordinated by the ALO;
- submission of the Substantive Change for Closure of the North East Branch Campus in Fall 2019 as well as the extension request necessitated by the consolidation timeline. (S2.C8: Substantive Change for the Closure of the North East Campus)

The university also conducts Compliance Workshops to ensure departments across the university are aware of their vast compliance obligations, and to provide a venue to discuss recent changes in legislation or practice that impact the university's compliance program. The workshops are typically held annually or biennially and the content from one year to another may change dependent on areas of focus that may arise through changes in legislation or the university's annual risk management process. (S2.C8: Compliance Workshops) The university also maintains a Compliance Matrix to identify the Cognizant Policy officer and compliance partners across the university. This matrix is maintained by the Office of General Counsel and distributed annually to the Cognizant Policy Officers. The first Compliance Workshop was held in 2012, with six additional annual workshops held through 2019. The 2021 workshop is scheduled for fall break 2021. (S2.C8: 2020-2021 Compliance Matrix)

The university also engages in annual risk management reporting to its Board of Trustees through the Audit Committee. While these reports are confidential and subject to attorney client privilege, the template and outline of these reports provides key information on the timeline and process of conducting risk assessment at the university related to the most significant risks facing the institution. (S2.C8: Risk Summary and Report).

Ensuring Vitality in Ethics and Integrity Standards

Mercyhurst University engages in regular review of the ethics and integrity standards and policies. Informal evaluations occur each time a concern or incident, however large or small, is brought to the attention of the administration. Ongoing evaluation leading to change is evident in the annual review of both the faculty and employee handbooks, as well as in adaptations of policy over time, such as the updating of the Human Resources site on the Hub, revamping of Title IX response procedures, and the enhancing of the parental leave policy to improve its effectiveness at providing new parents with guaranteed paid time off, regardless of whether or not they have existing sick or vacation days in their "leave bank". The university has an extraordinary track record for agility and flexibility in meeting the needs of the community and for on-going monitoring and evaluation underpinning effective, and when needed, rapid response. These attributes were particularly evident

during the global pandemic as policies and procedures were not only developed and implemented quickly and efficiently, but also made accessible and communicated widely through the Hub and university websites. For example, the “Resilience and Resolve” page was designed to serve as command center highlighting policy and procedures in nearly every area of university life, including academics, student life, residence life, and athletics, as well as links to COVID-19 FAQ’s, health and safety directives, screening forms, and updated information on active on-campus cases. Endeavoring to meet the evolving challenges of an evolving virus, in spring 2021 the site was updated to provide a center for reporting and monitoring campus community vaccination progress, and a dashboard providing information on current and total cases and number of quarantined students. (S2.C9: Resilience & Resolve Website)

Formal evaluations of policies occur in line with specific dates on which the policies were implemented. The university policy template requires a “date of creation” and “date of revision.” While annual review is expected, in practice, policies are typically reviewed more frequently, often driven by changes in operations that require various updates. For example, the COVID-19 Prevention, Mitigation, and Response Policy was updated on an almost monthly basis throughout 2020 and 2021 to keep up with changes at CDC and local health department. (S2.C9: Policy Template). Procedures for policy revision at the university take place on a variety of levels, including by Office of the General Counsel for legal and risk analysis, through human resources for use analysis, and by various stakeholders, including the president’s cabinet, academic affairs, and the various board of trustee and university subcommittees responsible for campus and community well-being. (S2.C9: Risk Analysis Sample) For example, the university underwent a rigorous evaluation of its policies and procedures as consistent with its mission and Mercy identity in 2020 through the Conference for Mercy Higher Education Self Study. (S2.C9: CMHE 2020 Self-Study) The report presented a positive review of a range of university policies and procedures, including curricular development, hiring and on-boarding practices, and community engagement. Based in part on this evaluation, the Mercy Emissaries programs was expanded and mission links to the budgeting process were strengthened. Another example of the university enacting formal assessment of university ethics and integrity is the Diversity and Inclusion Taskforce (DIT), formed in 2016 by the previous university president. (S2.C9: Diversity and Inclusion Taskforce Charge) The taskforce evaluated campus policies, processes, and practices and determined that a new student government council was needed, leading in 2017 to the establishment of the Multicultural Activities Council. Another example is the 2020 Equity, Justice, and Inclusion Initiative that resulted from the Diversity and Inclusion Taskforce study of campus life in the context of multiculturalism, racism, and privilege, which led to the establishment of Strategic Goals for Equity, Inclusion, and Justice. (S2.C9: Equity, Justice, and Inclusion Initiative Summary)

Other evidence of continuous review includes the Administrator Evaluation Committee of the Faculty, which ensures ethics and integrity in leadership through regular evaluation of academic administrators (i.e., deans and the vice president for academic affairs) and provides a confidential summary report of job performance based on the respective job description, including the demonstration of ethics and integrity in relation to the mission of the institution. (S2.C9: Faculty Handbook p.X) At the department/program level, assessment processes are linked to unit mission and goals as aligned with the university’s strategic plan and core values. Specific guidelines are provided in the Assessment Handbook. (S2.C9: Assessment Handbook) In addition, internal and external review processes linked to outside accreditation, such as nursing, have additional ethics and integrity criteria and measures. (S2.C9: NLN-CNEA Standards) In sum, Mercyhurst has created a culture of assessment that

contributes significantly to the creation of a culture of ethics and integrity, enhances the factual basis needed for understanding and decision-making, and the accountability of all stakeholders involved.

Key Findings

- Since a 2014 presidential task force that resulted in the *Students First* campaign, Mercyhurst University has made great strides in creating a climate of transparent communication with and support for students across the student services spectrum, particularly in admissions and student financial services.
- As the core element of the academic mission, the university seeks and retains a highly qualified and dedicated university faculty that is committed to high quality teaching, supported in scholarly and creative work, and dedicated to academic freedom at both the program and course level.
- The university demonstrates significant progress in providing substantive support in programming, policy, and personnel in administrative areas essential to the commitment to honor the dignity of work, particularly in human resources and through critical compliance, such as Title IX and the Americans with Disabilities Act (ADA).
- Committed to transparency in interactions with students, the university has significantly expanded its efforts to provide students with access to information and clear communication about all areas relating to matriculation, including, for example, admissions, enrollment, financial aid, and degree completion.
- The university reviews policies and procedures relating to ethics and integrity, both informally, as through regular review and updating of faculty, student, and employee handbooks, and formally, as through the Conference on Mercy Higher Education Self-Study.

Opportunities for Improvement and Innovation

1. It is recommended that the university continue its progress toward implementing performance review processes for all employees and that these processes have clearly articulated links to the university mission and core values.

Chapter 5: Standard III - DESIGN AND DELIVERY OF THE STUDENT LEARNING EXPERIENCE

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

Overview

Mercyhurst University meets the requirements of Standard III. A full description of the ways Mercyhurst University meets the eight criteria and all applicable sub-criteria of Standard III, as well as the Requirements of Affiliation 2, 5, 8, 9, and 15, are presented throughout this chapter.

Mercyhurst University takes great care to provide a robust educational experience guided by the Mission and Core Values of the institution and driven by excellence in teaching. Direct emphasis on the Mercy mission is placed throughout the curriculum. The core values connect all the components of a Mercyhurst education, encompassing both curricular and co-curricular experiences across undergraduate, graduate, and certificate programs as faculty and staff guide students through their educational development in becoming individuals who are socially merciful, globally responsible, compassionately hospitable, intellectually creative, and reflectively aware ambassadors of service. The university-wide student learning outcomes of civic engagement and intercultural skills, critical and creative thinking, effective communication, information literacy, quantitative and scientific reasoning, and ethical reasoning are embedded throughout the curriculum and involve the full faculty in development and assessment of these learning outcomes.

The curricula across all degree programs are intentionally designed, regardless of modality of instruction, to provide coherent student learning experiences and synthesis of learning throughout the program of study. Detailed information about all program requirements is made available to prospective and enrolled students through a variety of sources, including the university website, undergraduate and graduate course catalogs, student handbooks, program specific documents, admission and marketing materials, open houses and information sessions, Day-In events, orientation sessions, faculty advising, and academic support.

Committing to the Liberal Arts: General Education Curriculum

As the foundation of a Mercyhurst University education, the general educational curriculum is designed to provide undergraduate students with a broad liberal arts educational experience aligned with the university mission and core values and Mercy tradition. The general education program, called REACH and described in detail below, is consistent with the mission and tradition, which recognizes both the power and beauty of the liberal arts and the dignity of work. While freestanding, REACH intersects with courses in the academic programs, challenging students to become mature, well-rounded individuals who can succeed within and beyond their fields of study. (S3.C5: Mission, Vision, Core Values)

To begin, the REACH curriculum is grounded in the University-wide Learning Outcomes, which reflect the university's core commitment to provide an education that incorporates cultural and global awareness as well as cultural sensitivity, oral and written communication, scientific and quantitative reasoning, critical and creative analysis and reasoning, information literacy, values, ethics, and diverse perspectives.

Table 3 University-wide Learning Outcomes

<p>Critical and Creative Thinking</p>	<ul style="list-style-type: none"> • Skillfully conceptualize, apply, analyze, synthesize, and/or evaluate information gathered from observations, experiences, reflection, reasoning, and/or communication. • Effectively analyze and critically evaluate information and/or ideas from multiple perspectives in original ways; work in an imaginative methodology characterized by a high degree of innovation and/or divergent thinking.
<p>Effective Communication and Information Literacy</p>	<ul style="list-style-type: none"> • Demonstrate effective skills in writing, visual communication, and speaking with clarity, coherence, and purpose. • Access sources and evaluate information that facilitates critical inquiry; adhere to standards of academic honesty.
<p>Quantitative and Scientific Reasoning</p>	<ul style="list-style-type: none"> • Use mathematical concepts to make logically sound decisions, judgments, and/or predictions; effectively use scientific inquiry and reasoning to solve problems and analyze and interpret data.
<p>Civic Engagement and Intercultural Skills</p>	<ul style="list-style-type: none"> • Develop the knowledge, skills and values to promote a quality of life that is both individually enriching and socially beneficial. • Demonstrate an understanding of cultural diversity and multiple global perspectives in order to interact effectively in multicultural contexts.
<p>Ethical Reasoning</p>	<ul style="list-style-type: none"> • Develop informed awareness and understanding of ethical conduct, social responsibility, and academic and professional integrity. Assess individual ethical values and the social context of problems, recognizing ethical issues in a variety of settings, and considering the ramifications of alternative actions.

The general education curriculum consists of the Freshman Experience, the Liberal Arts Experience, the Senior Experience, and the mission/Mercy curricular experience, outREACH. (S3.C3: REACH website)

The Freshman Experience

Providing the critical foundation in oral and written communication, the freshman experience is comprised of three courses. The first course is the three-credit COMP120 Research and Writing, which is an introduction to academic writing and thought and a foundational course in the core commitment to effective oral and written communication. (S3.C5: COMP120 Syllabus Sample) Rounding out the freshman experience are two one-credit courses: Introduction to Mercyhurst (iMU101) and Involvement at Mercyhurst (iMU102). The iMU courses address smaller cohorts of student learners in facilitated and individualized classroom learning environments led by faculty or other university employees who relay consistent course content to first-year students. The iMU courses introduce students to the values articulated in the university mission and the call to service and commitment to others established by the Sisters of Mercy tradition, as well as the knowledge and skills consistent with the university vision and core values. In addition to general information relating to an effective transition to campus and university life, students are introduced to university resources available to support student success, such as career development, the library as a place to assist with research, and future opportunities such as study abroad or other off-campus experiences. The iMU courses also encourage a process of self-discovery and the building a community among learners from various disciplines. (S3.C4: iMU 101 Syllabus Sample, S3:C4 iMU 102 Syllabus Sample, S3.C5: iMU 101 Syllabus Sample, S3:C5 iMU 102 Syllabus Sample)

The Liberal Arts Experience REACH

The liberal arts core of the REACH curriculum is comprised of a ten-course requirement that students undertake in different disciplines. (S3.C5: Undergraduate Catalog – REACH) To ensure that students explore a variety of fields of study and to provide a breadth of engagement, students are required to take two courses in each category, each with a different prefix. Any course offered at the 100- or 200-level within a REACH-designated prefix can fulfill the liberal arts requirement. The diversity of offerings within the general education curriculum provides students the opportunity to explore a wide range of content and program option. Moreover, specifically linked to the university mission, the categories express the university’s unique identity and liberal arts commitment, from an explicit requirement in the Reason and Faith category to a celebration of the arts in Expression and Creativity to a substantive grounding in a broad range of general knowledge resonating the power and beauty of the liberal arts through the Analytical Thought, Contexts and Systems, and Humans in Connection categories.

Table 4 Liberal Arts Experience Summary

	Theme	Applicable Academic Disciplines
R	Reason & Faith	Catholic Studies, Philosophy, Religious Studies
E	Expression & Creativity	One course in English, plus one course in Art, Dance, Music, or Theatre
A	Analytical Thought	Biology, Chemistry, Geology, Mathematics, Physics, Science (including at least one science with a lab)
C	Contexts & Systems	Economics, History, Political Science
H	Humans in Connection	Anthropology/Archeology, Psychology, Sociology, World Languages

Taken together, the five categories, identified by the acronym REACH, provide a literal and metaphorical visioning of student growth and development through the university’s core curriculum. *Grounded in the firm foundation of the freshman experience, through these ten courses students extend themselves into the beauty and diversity of the liberal arts, explore a range of content options and methods, and strive for a clear vision of those things most worth reaching for.*

The Senior Experience

The Senior Experience consists of two required capstone courses, a senior capstone ethics course and a capstone course or experience within the academic program/major. The Senior Experience capstone courses build upon a solid foundation of the full curriculum alongside major program-specific content and learning opportunities. The first requirement, ETH400 Capstone Ethics, provides both a critical link to the mission and Mercy values inherent in a Mercyhurst education and a significant capstone synthesis of the general education experience. By design, ETH400 is situated last in the sequence of the general education curriculum. The purpose of the course is to help students come to a greater understanding of their own moral framework and connect that framework to their major program of study, the mission and core values, and students’ whole educational experience. University-wide learning outcomes are addressed throughout the course, particularly through the lens of social justice. In addition, ETH400 builds upon students’ earlier experiences to prompt a catalogued

reflection of the student's maturation and reasoning abilities through the lived experience of the full curriculum. (S3.C1: ETH 400 Syllabus Sample, S3.C5: ETH 400 Syllabus Sample)

As detailed further below, each student also has an opportunity to demonstrate discipline-specific competency with a separate major capstone experience such as a performance, field experience, or a significant research project. The capstone experiences within the major are also connected to the general education outcomes articulated within the REACH curriculum. For example, in the capstone assessment survey administered in 2019 by the Office of Institutional Effectiveness, program chairs reported significant alignment to university-wide outcomes such as civic engagement and/or quantitative and scientific reasoning and provided context for how students demonstrated learning with respect to communication and creative thinking when completing capstone experiences. (S3.C1: Major Capstone Experience and University Outcomes Alignment, S3.C5: Major Capstone Experience and University Outcomes Alignment)

outREACH

As introduced in Chapter 3, the outREACH initiative builds on the foundation of the other REACH components to expand student learning opportunities grounded in the university mission, core values, and Sisters of Mercy legacy. Within this particular focus, outREACH provides three designated curricular points of contact that include specific mission-based student learning outcomes and that promote the mercy values that make a Mercyhurst education unique. Each curricular contact occurs at a specific point in the student matriculation: the two 1-credit terms of iMU in the first year; the 1-credit Beyond the Gates course (BTG300) in the second or third year; and the 3-credit Capstone Ethics course (ETH 400) in the final year. (S3.C5a: Undergraduate Course Catalog – REACH) Each of the courses provides specific study and experience relating to the university mission, core values, history, and the Sisters of Mercy legacy. As appropriate, each course also includes community engagement and service learning as essential to the university mission. For example, the Day of Service marks the beginning of freshmen matriculation and iMU101, and the substantial content and service learning hours requirement in BTG300 support and reinforce the Mercy commitment to service to other. (S3.C5: Day of Service Overview, S3.C5: BTG 300 Syllabus Sample)

In iMU 101 and iMU 102, concepts are introduced. In BTG 300, the concepts are reinforced through specific content and service-learning hour requirements with regional non-profit community organizations. In ETH 400, the concepts are reinforced through integrative connection to ethical theory, values formation, and lifelong learning. Binding the three curricular experiences within the outREACH initiative are four specific questions relating to mission integration:

- Do students understand the Mercyhurst Mission?
- Do they develop over time a fuller appreciation for what makes a Mercyhurst education unique?
- Are they able to articulate the value of the Mercyhurst experience?
- Does the Mercyhurst experience over the four-year matriculation evidence an increased level of mission integration in its students?

To address the critical questions above, a longitudinal assessment was created in collaboration with the Office for Global Programs and Experiential Learning and the Assessment Coordinator. (S3.C8: outREACH Rubric) Each of the three course experiences in outREACH occurs at an established point in the student's matriculation, which allows for a consistent measurement timeline: first-year; second year; and fourth year. Student performance

data are collected at each point in the timeline, allowing for a longitudinal mapping of student learning across the four-year matriculation. These data are collected through written responses to reflection prompts as part of the requirements in each course. All reflections are submitted to the university’s electronic portfolio system and are then assessed by outREACH staff and instructors using a consistent rubric. The rubric allows for evaluation of student responses on a maturational scale with achievement levels, such as *emerging*, *developing*, *adept*, and *exemplary*. The maturational continuum that drives this developmental assessment is grounded in the expectation that, across the four-year matriculation, the majority of student ratings would move from little or no understanding to a more mature or nuanced understanding of mission and Mercy. In academic year 2020-2021, the outREACH initiative reached a critical milestone: the office of global programs presented to the vice president for academic affairs the first full 4-year cohort of longitudinal data on the assessment of student learning outcomes relative to mission integration. (S3.C5: outREACH Longitudinal Data, S3.C8: outREACH Longitudinal Data)

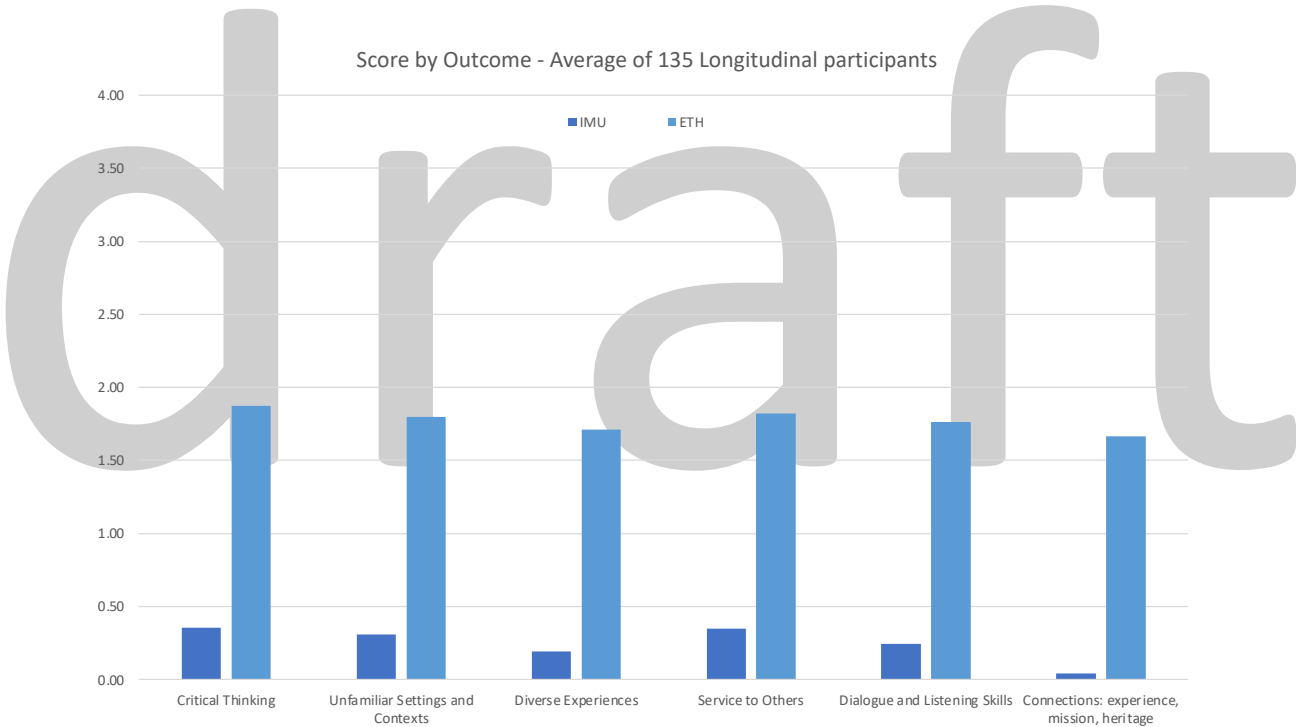


Figure 1 Growth through outREACH experiences

Engaging with the Discipline: Academic Programs

Mercyhurst University offers a wide array of certificate, associate, baccalaureate, and graduate programs leading to a degree or recognized higher education credential. (S3.C1: Undergraduate Catalog – Degrees & Certificates; S3.C1: Graduate Catalog – Degrees & Certificates) All academic programs at Mercyhurst University have an Academic Plan, coordinated by OIE but owned and maintained by the department. Developed by faculty within the respective departments, the Academic Plan includes the program mission, student learning outcomes (SLOs), curriculum map, and assessment mechanisms.

Samples) As detailed in Chapter 7: Standard V – Educational Effectiveness Assessment, regular review and assessment of program mission statements and curricula are undertaken to assure alignment with and support of the university mission and core values. In addition to SLOs, programs with discipline-specific accreditation have additional parameters established by the accrediting bodies for both content and objectives. (S3.C1: Programmatic Accreditation List)

Academic Programming: Curriculum and Expectations

Mercyhurst University has a set of general policies and guidelines that set basic standards for all undergraduate



S3.C1: New

Program Application Samples)

in the graduate catalog, the university provides graduate students with a variety of learning opportunities that support the development of research, scholarship, and independent thinking. (S3.C6: Graduate Research Opportunity Examples) The resources to support these graduate programs center on research and writing and provide venues to communicate and publish scholarly works, field placement

opportunities, and national exam preparation. Many graduate programs offer a research methods course relevant to the discipline and assessed as part of departmental assessment plans. Additionally, students in graduate and undergraduate programs have access to Collaborative Institutional Training Initiative (CITI) modules. Data are collected on the usage of the training, the types of training modules completed, and the overall successful completion rates. Faculty who teach research methods courses as well as members of the Institutional Review Board (IRB) use these data to ensure that students pursuing IRB approval understand the ethical responsibilities with research and human subjects. (S3.C6 2020-2021 CITI Report)

Graduate programs at the university offer a number of opportunities for the development and presentation of research and scholarship, including:

- thesis and/or capstone projects in the program of study;
- opportunities to present their research to the faculty and students in their programs and at local, regional, or national conferences; (S3.C6: Student Scholarship Symposium 2021 Program)
- university or grant-funded graduate assistantships that allow students to assist faculty with their research and/or other scholarly projects (S3.C6: Graduate Employment Summary)
- formal or informal faculty-mentoring programs in which faculty members work with students on research projects tied to course curriculum in their courses;
- and internship, practicums, and clinical rotations.

Academic Programming: Communicating Requirements

Detailed information about academic programs is available to prospective and enrolled students through a variety of sources, most notably the university website, the catalogs, and the Hub. The university website contains information about

The university website also enables prospective students to access information about admission events, including Open Houses and Information and Program Spotlight sessions, which provide prospective students with opportunities to obtain more information from program faculty about programs, including degree requirements and time to completion. (S3.C3: Prospective Student Website Samples)

University catalogs are electronic, searchable documents featuring main menus that provide easy access to degrees/certificates and course descriptions. Students can access information about degrees and certificates through an alphabetical list or by department. When a specific degree is selected, additional details such as a description of the program, the student learning outcomes, opportunities associated with the degree, and a listing of course requirements are displayed. Each course in the requirement list is linked to the course description to create a dynamic user interface that allows for a clear understanding of program requirements. (S3.C3: Undergraduate Catalog – Anthropology, S3.C3: Graduate Catalog – Data Science Program)

Another source of information for current students is the university Hub. Information accessible through the Hub includes the academic calendar, details regarding the REACH liberal arts curriculum, university-wide graduation requirements, student support services, etc.

In addition to the broad range of information provided electronically, the university utilizes many in-person events and activities to disseminate critical information about academic programs and requirements to prospective and new students. For example, both the graduate and undergraduate admission offices host numerous events throughout the year, including Open Houses, Information Sessions, Day-in events, and Program Spotlights. Program materials are provided to prospective students at these events, including Hot Sheets which provide details of admission requirements and time to completion. Summer orientation sessions are another example, as newly enrolled students meet with a faculty member from within their chosen major or program, allowing for further clarification of program requirements, including degree requirements and academic policies. (

Academic Programming: Ensuring Effectiveness

Committed to regular assessment as critical to continuous improvement within major programs and the general education curriculum, Mercyhurst University has worked diligently over the last ten years to cultivate a culture of assessment. As detailed further in Chapter 7: Standard V – Educational Effectiveness Assessment, academic departments and programs use a range of assessment tools to evaluate progress toward departmental goals and achievement of student learning outcomes. Through academic plans and curriculum maps, departments develop goals and learning outcomes, articulate the curricular trajectory for each program including designated performance levels, and establish on-going program assessment through the Five-Year Plans. (S3.C8: Assessment Handbook) Other assessment strategies include the sophomore review process conducted by faculty across many undergraduate programs to assess student progress at an early stage of the educational journey within the major/program. While the specific processes for sophomore review are determined by the individual academic department, the goal is to provide crucial information to the student early in the program matriculation and to document student performance within predetermined student learning outcomes as part of departmental five-year self-study assessment process. (S3.C8: Sophomore Review Process Samples)

The curriculum map for each program articulates how learning is connected to promote synthesis by identifying where in the curriculum students are “introduced” to concepts/skills, where these concepts/skills are “developed,” and where these concepts/skills are expected be “mastered.” The maps also include information on how and when learning will be assessed to ensure that students stay on track and meet the established learning outcomes for the program of study

As documented in the Assessment Handbook, faculty within each department also conduct annual departmental assessment of specific student learning outcomes. Each year, OIE reviews the assessment process and determines, based on a number of institutional factors, what the annual reporting structure will be. For example, prior iterations of reporting focused on quantitative results and action planning; whereas more recent versions focus on departmental reflection and the use of results to ensure ongoing program effectiveness. More details about the annual assessment reporting process and the ongoing improvement of that process are found in Chapter 7: Standard V – Educational Effectiveness Assessment.

Despite changes in the reporting format, this annual process allows departments to assess student learning outcomes and examine critically pedagogical practices for the purpose of program improvement. For example, during the transition to the REACH curriculum in 2016, many departments adjusted course content to align with

learning objectives with the REACH curriculum while still meeting departmental goals and program learning outcomes. (S3.C8: Program Change Application Samples)

Another opportunity for analysis is the Five-Year Self-Study, in which academic departments are required to reflect on assessment processes over the past four years within the larger context of faculty composition, departmental resources, and future goals. The Five-Year Self-Study process also provides an opportunity for departments to work closely with OIE and to ensure that an up-to-date Curriculum Map and Assessment Plan are in place. (S3.C8: Five-Year Self Study Guide)

Committing to Teaching Excellence: Faculty

Mercyhurst University is fortunate to have an assembly of highly skilled full-time, part-time, and contingent faculty dedicated to the mission of the university and to the design and delivery of rigorous student learning experiences. Critical to expectations of faculty is the university's unwavering commitment to teaching excellence as the hallmark of faculty quality. As indicated in the Faculty Handbook, teaching effectiveness must be the primary area of strength for all faculty. Individuals then have the option to choose a secondary area of strength as either scholarship or service, or a combination of both. Specifically, the Faculty Handbook specifies that all faculty must "commit themselves with mind, heart, body and resources, to the discovery and elucidation of knowledge and the sharing of that process and its products with students without prejudice." In this way, Mercyhurst affirms its clear commitment to ensuring that all faculty are rigorous and effective in teaching. Additional faculty expectations as outlined in the Faculty Handbook include participation in advising, assessment, and service to the institution.

Mercyhurst ensures that faculty are qualified for the positions that they hold both through ongoing evaluations, described below, as well as in the initial hiring process. Consistent with the university's commitment to academic excellence, the faculty hiring process is rigorous, inclusive, and linked to mission. Prospective faculty members are interviewed by departmental faculty representatives and administration, including, for full-time hires, the vice president for mission, and faculty from outside the hiring department, who represent the broader mission and core values that bind the Mercyhurst community. Within the hiring process, the department chair, dean, and members of the search committee work with the administration to certify that candidates possess the necessary educational qualifications as outlined in the Faculty Handbook () and human resources policies () and to ensure that the expertise and content area requirements of a program are satisfied.

Using a variety of metrics including program and course enrollments, REACH course needs, and advising loads, OAA and OIE review and ensure the sufficiency of faculty in the design and delivery of programmatic and general education curricula.

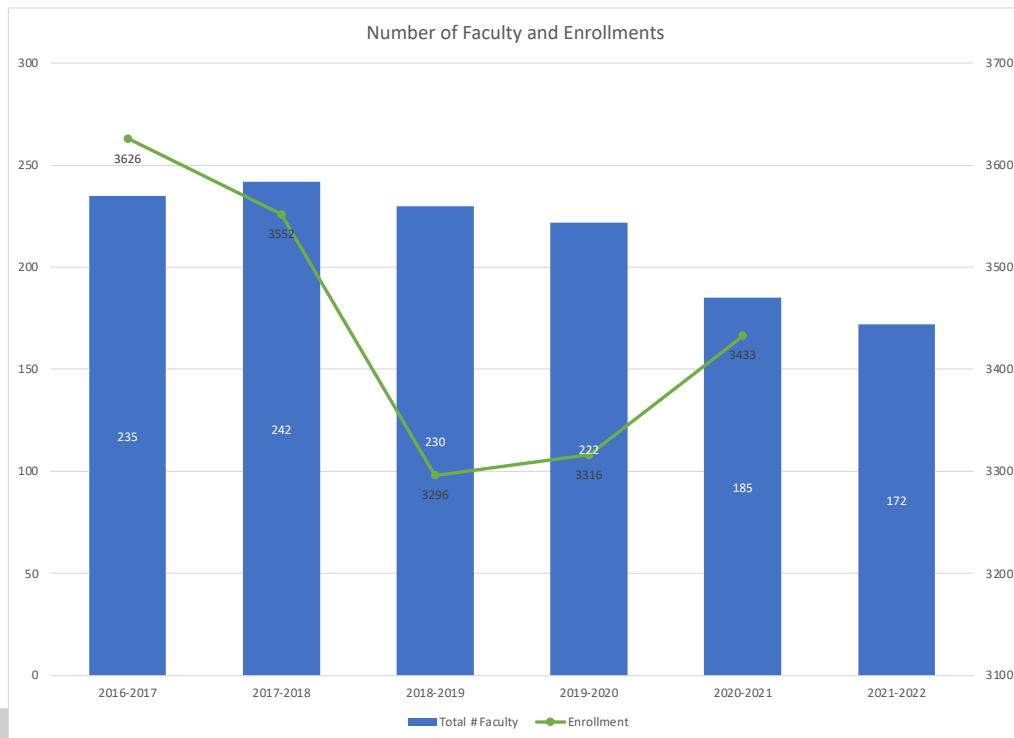


Figure 2 Faculty Sufficiency, as represented by total number of enrolled students and total number of faculty

In support of teaching excellence, the university provides a variety of opportunities and resources to encourage faculty professional growth and innovation. For example, faculty gather at the beginning of each academic year for Faculty Development Days, a joint initiative of the OAA and the FDC aimed at providing faculty members with necessary academic information and opportunities for professional development, such as the Fall 2021 Faculty Development Days workshop on diversity and inclusion in the classroom (S3.C2: Faculty Development Days Schedule Samples) In addition, the Center for Teaching Excellence (CTE) plays a vital role in supporting teaching and learning. Under the direction of a faculty member and guided by the Faculty Development Committee (FDC) and the Office of Academic Affairs (OAA), the CTE offers professional development programs and resources related to teaching, scholarship, and general academic life to faculty across campus. (S3.C2: CTE Programming Samples) For example, the CTE has provided weekly “Lunch and Learn” sessions on various topics of interest in teaching, offered as brief tutorials followed by general discussion. The CTE has also worked in cooperation with the FDC to provide a venue for faculty to share their scholarship and research. This process allows faculty to make connections within and across disciplines and to find ways to collaborate in research opportunities. Notably, the CTE has taken a very active role in providing support for faculty during the on-going pandemic. Since spring of 2020, the CTE has provided series of more than 50 webinars and workshops and produced more than 25 training videos focused on classroom planning, management, student engagement, and use of technology. A regular newsletter alerts faculty to upcoming events, and the CTE has made use of Microsoft Teams to provide a collection of resources for faculty, including books and articles. (S3.C2: CTE Newsletter Samples) During the fall semester 2020, the CTE partnered with the Evelyn Lincoln Institute for Ethics and Society to create a faculty development series on Diversity, Equity, and Inclusion in the classroom. (S3.C2: ELIES Diversity, Equity, Inclusion and Justice Faculty Seminar Series)

The university also provides faculty with opportunities for and encourages the pursuit of scholarly interests and research. As detailed in the Faculty Handbook, the university supports faculty research directly through university-funded research funds housed in the operating budgets of the four college deans. (

Monetary funding caps are placed to ensure that sufficient funds are available for at least partial support for as many applications as possible in a given fiscal year. Each college dean has an application and approval process for obtaining funding within two categories: faculty scholarship presentation grants and faculty scholarship exploration grants. For example, the Walker College of Business utilizes a funding application that is submitted to a committee comprised of faculty within the college. The committee reviews the applications and makes funding recommendations to the dean. Further, as funding allows, college deans can support other faculty projects in support of the student learning experience. (S3.C2: Walker Research Funds Documentation) In addition to sabbaticals and release time, the university supports faculty research through a variety of venues, including the annual Celebration of Scholars, an event that honors faculty achievement in research and scholarship. (S3.C2: Celebration of Scholars 2021 Program) In addition, the Faculty Scholarship Committee of the Faculty Senate makes recommendations to the university on policies relating to faculty research and the Institutional Review Board. Finally, the university supports faculty-directed student research and scholarship and celebrates the importance of this vital faculty-student connection through the annual Illuminations publication. (

Finally, Mercyhurst University has an articulated process for faculty evaluation that both supports faculty development and demonstrates the university's on-going commitment to teaching excellence consistent with the mission and Mercy tradition. Detailed in Section V part D of the Faculty Handbook, faculty evaluation is an annual process for faculty in the tenure track and faculty with less than seven years employment. (

) Tenured and non-tenured faculty with seven or more years employment are evaluated every three years. Within this process, faculty members conduct self-evaluation, which is submitted to the department chair and the associate dean and/or dean. Both the chair and associate dean and/or dean write separate evaluations based on the self-evaluation, any classroom/teaching observations, and any additional information. The evaluation letters are then shared with the faculty member and sent to the OAA to be included in the faculty member's professional file.

effectiveness. Teaching observations also provide opportunities to review course content alignment with department and course goals, as well as content coverage and pedagogical practices, to ensure effective instructional delivery. Thus, the classroom observations are important tool for formative discussions and faculty mentoring to achieve the high level of teaching effectiveness expected of all faculty at Mercyhurst University.

Recognizing the importance of teaching excellence and academic professionalism, processes exist for the promotion of both tenure-track and non-tenure track faculty to ensure the overall quality of the faculty. Section VI of the Faculty Handbook details the university's tenure policies and procedures, citing specifically the requirement that individuals seeking tenure evidence "consistent demonstration of superior effectiveness and interest in teaching" as the primary consideration for tenure. (S3.C2: Faculty Handbook p.X) Faculty members undergoing review with the tenure and promotion processes are reviewed by the Office of Academic Affairs and the Rank and Tenure Committee, elected representatives of the tenured faculty, as part of the pre-tenure, tenure, and/or promotion process as outlined in Section VI of the Faculty Handbook. The nontenure-track promotion system is an analogous process in which nontenure-track faculty are reviewed by the respective departments, deans, and the OAA. These reviews for promotion and/or tenure include a portfolio by the faculty member, a current CV, all teaching observations and annual evaluations, student evaluation reports, colleague and student interviews, and letters of recommendation by the chair and dean/associate dean.

Cultivating an International Perspective

Overseen by a dedicated dean of global programs, study abroad at Mercyhurst has grown dramatically over the last ten years. Detailed on the university HUB, study abroad at the university is facilitated through the Office of Study Abroad and overseen by the dean of global programs. Grounding the university's growth and development in study abroad is the Faculty-Student Academic Travel (FSAT) program, which creates and facilitates affordable short-term, course-related programs in which students and faculty learn and travel together. Students enroll in courses fulfilling either a general education or major program requirement that are customized by one or more Mercyhurst faculty members and which culminate in academic travel to locations around the world. Courses are offered in the regular university terms, and travel takes place during breaks, usually in January or after graduation in May. Through FSAT courses, students grow in their capacities to be thoughtful, analytical, and aware global citizens. Students are accompanied by course instructors, who offer instruction and require participation in lectures and discussions which begin in the classroom and continue at the travel destination. (S3.C5: Faculty-Student Academic Travel Program Overview)

The jewel of the university's study abroad program is the Mercyhurst in Ireland program. Inaugurated in 2010, the Mercyhurst in Ireland program provides university students and faculty the opportunity to live and learn together on-site in Dungarvan, County Waterford, Ireland, for eight weeks, usually the end of the spring semester. Mercyhurst students and faculty live in leased townhouses and conduct classes in leased classroom space provided through the Dungarvan Enterprise Centre. Through the program, students complete regular Mercyhurst University courses applicable to general education curriculum requirements, as well as courses in the major programs represented by the faculty living onsite during a given term. During their stay, both students and faculty are integrated into the life and culture of a small city on the southeast coast of Ireland, shopping in local stores and eating in local pubs, joining clubs and organizations, and working with and among the community through service projects and regional events. As is the case with the FSAT program, given that

Ireland courses are university courses within the students' regular enrollment, students pay only for costs relating to the travel program. (S3.C5: Mercyhurst Ireland Program Overview)

The university also offers robust opportunities for students seeking independent study abroad for academic terms or full academic years. Through nationally recognized affiliated providers, such as AIFS, CEA, Semester at Sea, and Cultural Experiences Abroad, the university facilitates independent study abroad for, on average, three to five students each year.

The differentiator between the Mercyhurst approach to study abroad and that of traditional study abroad programs is clear: the commitment to providing curricular experiences that combine learning with travel to enhance the development of the whole person. This is achieved through a partnership between the faculty and the Office of Study Abroad, and the focus of that partnership on direct participation with the university's academic student learning objectives.

Supporting the Student Learning Experience

The university provides a variety of resources that support the institution's programs and the academic progress

Essential to academic support is the university's robust student advising program. Upon enrolling, every undergraduate student is provided with both an academic advisor and an academic counselor. The academic advisor is typically a faculty member from the student's major program. In the case of undeclared students, experienced faculty members are selected to serve as advisors to guide students as they progress toward declaring a major and choosing an academic advisor in that major. The academic counselor from Academic Services and Support works closely with students to ensure satisfactory academic progress, provide guidance, and offer referrals for a variety of student needs, including tutoring, counseling, and other support services. Students are monitored by both the academic advisor and academic counselor through the Self-Service online platform, which allows real-time information to be shared on many aspects of student's academic progress, including attendance, early alert notifications, and performance (S3.C4: Self-Service Screen Samples). Further, the enrollment functions within Self-Service allow for shared information on all aspects of the student's academic progress, including, for example, detailed notation of registration planning, advisor approvals, and program completion progress. Academic advisors and counselors are available to meet with students at any time, but to ensure student academic progress, time is set aside each term for formal advising through Advising Day, which is scheduled each semester in the formal academic calendar, one week prior to course registration for the following semester. No classes are held on Advising Day to provide maximum opportunity for students to meet with their advisors/counselors and engage in deliberate and thoughtful review of the student's current academic standing and planning of the schedule for the next semester. During individual advising meetings, faculty discuss student progress toward degree completion and advise students accordingly if they are falling short of meeting program requirements. Thus, in support of student success, academic advisors and academic

counselors work together to provide students with the resources they need to be successful. (S3.C4: Advising

Academic Services and Support is also essential in providing the information, resources, and referrals critical to academic success. Within this functional area, students have access at no additional charge to support resources such as the Writing Center, the Testing Center, and Tutoring. For example, staffed with peer tutors, the Writing Center offers guidance and support to students seeking assistance with course-related writing assignments. Through the Tutoring Center, students have access to assistance with a peer tutor to review course content or prepare for an exam or presentation. The Testing Center offers testing services for all students requiring alternative testing arrangements, such as extended time on exams, a reduced distraction environment, or needing to complete a make-up exam. In addition, the Office of Career and Professional Development encourages students to engage in major exploration and career planning beginning with their first year with opportunities, such as an annual career fair and career workshops. The career fair provides students with an opportunity to network with potential employers, while the career development workshops help prepare students for employment fairs or job interviews and provide guidance to students through the internship process. In addition, Career Services offers a variety of internship opportunities, available to all students, to support academic progress and future employment opportunities. Additional details about these critical services are found in Chapter 6: Standard IV- Support of the Student Experience

The university also provides resources and informational materials to assist students throughout their matriculation in degree/program completion. For example, beginning with New Student Orientation, students and families are provided information about the institution and available supports, such as the Orientation Family Guide, which contains resources about the REACH curriculum, academic support, student life, and residence life. Academic support resources provided to students, such as the 15-to-Finish campaign, which encourage students to enroll in at least 15 credits each semester of their undergraduate program to remain on track for degree completion. In conjunction with the 15-to-Finish campaign for students, prior to advising day each semester, Academic Support sends to faculty an advising day reminder letter, which includes information to share with students about maintaining academic progress and staying on track to graduate. (S3.C4: #15toFinish Poster)

In addition to the formal academic support discussed above, the university demonstrates its commitment to student academic success through a consistent process of improving functions, processes, and resources. For example, the university invests significantly in support for and training in Blackboard, the university-wide learning management system used by faculty to support student academic progress. Through Blackboard, students have direct access to both the course instructor and course content, as well as assignments, supplemental course materials, and grading. Similarly, the university provides all employees and students access to the Microsoft 365 suite, Zoom, and Screencast-o-Matic to support document sharing, organization, the creation of video content, and online/web meetings. (S3.C4: 2020-2021 IT Training Schedule)

COVID-19

In response to the global pandemic, during Spring Semester (mid-March) 2020, academic operations at Mercyhurst University, including all in-person courses, abruptly transitioned to remote instruction (via Microsoft Teams and BlackBoard) and remained remote through the summer for those programs offering summer semester/mini courses. Academic support services, including the Tutoring and Writing Centers, quickly pivoted to provide necessary services to students in remote/online formats. Given the transition and the unprecedented challenges/stress brought about by the pandemic, students were afforded the choice as to complete spring semester courses for traditional letter grade or to declare some or all courses as pass/fail. Along the same line, no formal course/instructor evaluations (IDEA-SRI) were conducted in spring semester courses; however, departments did provide reflection as to the impact of the transition as part of the 2020 annual assessment process led by the Office of Institutional Effectiveness (OIE). In preparation for the start of the Fall Semester 2020, the university, under the direction of the provost, developed and effectively implemented the Hurst Hybrid Model for academic course offerings. This model outlined different modes of content delivery (i.e., in-person, hybrid-A/B, and online) based upon course enrollment and physical space (classroom, laboratory, and/or studio) given the need for social distancing and provided flexibility between formats if/when cases of COVID-19 arose. The college deans and associate provosts, in conjunction with the Center for Teaching Excellence (CTE), offered numerous training sessions to support faculty with new classroom/teaching technologies, such as Zoom, Screencast-o-Matic, and video cameras, as well as a variety of pedagogical support, such as effective classroom management, flexible course design, and online assignments and grading. The university operated within the Hurst Hybrid Model for program delivery of student learning experiences for the full academic year 2020-2021. Throughout the on-going pandemic, the university has emphasized flexibility while maintaining robust and rigorous coursework and expectations for high-quality instruction to support the student learning experience.

Key Findings

- Policies and practices within academic affairs, such as including the vice president for mission in faculty hiring and submitting all new academic program proposals to the full faculty senate for review, demonstrate the university's commitment to shared governance in the spirit of one university, one mission.
- Clear progress has been made in the university's approach to the general education curriculum; the REACH curriculum is grounded in a clear vision of student development that is easily articulated and achievable.

- The university demonstrates impressive commitment to and progress in the assessment of Mission integration through the outREACH initiative.
- The university's approach to academic program evaluation is comprehensive and systematic; through assessment plans, curriculum mapping, and five-year self-studies, academic departments are engaged in substantive assessment for continuous improvement.
- The university has made impressive progress in expanding global student learning opportunities through Mercyhurst in Ireland, as well as through the development of a substantive study abroad program, which includes the vibrant offerings with the course-connected, faculty-led FSAT Program and affiliate term- and semester length programs. Grounded in clearly articulated student learning objectives, the study abroad program, through its piloted assessment model, indicates a positive trajectory for the university in continuing to develop and implement student support services assessment.
- The university continues to demonstrate its commitment to teaching as core to the mission, as evidenced by the strong presence of teaching effectiveness in faculty and course evaluations processes, faculty performance criteria, and tenure and promotion, as well as in the availability of defined teaching support resources, such as the Center for Teaching Excellence, the Office of Distance Learning, and Faculty Development Committee.
- The university has committed to supporting student success through a focus on and significant investments in resources, particularly in technology, to enable academic and student support units to collaborate more effectively, share information more efficiently, and work together more closely to provide a community of support for students from admission to degree completion and beyond.

Opportunities for Improvement and Innovation

1. It is recommended that the university continue its progress toward implementing effective and sustainable
2. While the university continues to evidence that it both values and supports faculty and student scholarship and research, it is recommended that the university review its policies in light of notable decreases in the availability of research-related funding and course release over the past several years and develop more consistent and systematic approaches to allocating funding and assessing both the processes for and outcomes from supporting faculty research and scholarship.

Chapter 6: Standard IV- Support of the Student Experience

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

Overview

Mercyhurst University meets the requirements of Standard IV. A full description of the ways Mercyhurst University meets the six criteria and all applicable sub-criteria of Standard IV, as well as the Requirements of Affiliation 2, 8, and 9, are presented throughout this chapter.

Inspired by the legacy of the Sisters of Mercy and guided by the university mission, support for the student experience runs deep at Mercyhurst University. Descriptions of the university's support of the student experience teem with examples of a deep concern for the well-being of students with special attention to building relationships between students and the university faculty, staff, and administration. University areas from Admissions and Student Financial Services through Student Life, Mission, Academic Affairs, and Advancement all play a vital role in support of the student's success in integrating into the Mercyhurst community, in thriving in academics, in co-curricular pursuits and social acclimatization, and ultimately in realizing their goals as flourishing alumni in their chosen careers. In this way, Mercyhurst students are truly, Lakers for Life.

Establishing the Foundation: New Lakers

Admissions and Enrollment

Commitment to the student experience begins long before a student steps on to the campus, as evidenced by the university's attention to and investment in efficient, transparent, and informative admission and enrollment processes. For example, over the past five years, the university enrollment division has integrated a variety of Customer Relationship Management (CRM) software solutions to improve and expand the ways in which admissions professionals manage prospective students. The current CRM, Slate, allows seamless and consistent communication of information about inquiries and applicants and provides a means for documenting such communications. (S4.C1: Slate Communication Samples) From the base of consistent shared information, admissions staff are able to provide students with easy access to accurate and comprehensive information about academic programs, campus opportunities, costs of attendance, and available financial aid. (S4.C1: Slate Student View Samples)

Graph or Table of Admissions Communications Here

Recognizing that affordability and financial wellness are critical to student success, and in the spirit of the university mission, the university is committed to student-centered admissions and enrollment processes that include prompt dissemination of financial aid information. Thus, the university provides accurate and comprehensive information regarding expenses, financial aid, scholarships, grants, loans, repayment, and refunds. The admissions site on the university webpage provides financial aid information links tailored to

associate, undergraduate, and graduate degree applications. (S4.C1: Admissions Website) Each financial aid landing page provides information about tuition and fees, financial aid and scholarships, and value and affordability, as well as links to useful resources. In addition, prior to admission, students receive comprehensive financial aid documents, including a financial aid offer letter, one of a variety of mechanisms utilized by the university to communicate all aspects of financial literacy relating to potential funding. Other examples include print materials, such as a Mercyhurst-specific guide to financial aid, and links to numerous online resources. (S4.C1: Financial Aid Document Samples) Finally, Mercyhurst consistently meets or exceeds the expectations of independent auditors, who regularly request information to verify that the university is addressing student needs. (S4.C1: Financial Aid Audit Results)

Once enrolled, students have access to the Financial Aid Student Hub site with comprehensive written instructions and guidance for common issues students face in paying for higher education. (S4.C1: Financial Aid Hub Site) Student Financial Services (SFS) focuses on outreach through a communication plan designed to remind students and their families of key dates and obligations throughout the year. Enacting the Students First Commitment, SFS representatives are available every working day at a centrally located walk-in counter, and SFS representatives are available via phone and email, providing students and their families access to subject matter experts who usually responded within 24 hours. Other SFS student support strategies include available one-on-one counseling, orientation presentations, and student peer mentors. (S4.C1: Student Financial Services Peer Mentor Program Overview) SFS also conducts individual outreach when students are behind in document submission or bill payments and assists students in accessing funding promised to them by outside agencies. (S4.C1: Student Financial Services Communication Samples)

As with SFS, the Office of Admissions is committed to student-centered, responsive, and information-rich processes in support of the student experience. Admissions staff are responsible for reviewing prospective student applications to ensure that students are prepared to study at the academic level to which they are applying, including certification, associate, baccalaureate and graduate levels. Committed to the holistic review of applications, the university accepts direct applications and participates in the Common Application system. For undergraduate admissions, the application process includes academic transcripts, a writing sample, and, in some cases, a letter of recommendation. At the graduate level, additional program-specific items may be required in addition to the above materials, such as an in-person interview. (S4.C1: Undergraduate Admissions Requirements, S4.C1: Graduate Admissions Requirements, S4.C1: Secondary Education Program Admissions Requirements) All admission processes are committed to on-going quality review and the use of data in decision-making to improve operations. For example, the decision to move to a test-optional application and allow self-submission of transcripts was made to provide greater flexibility to students, which proved invaluable when the global pandemic compromised student access to these processes. (S4.C1: Test-Optional Implementation Results) Moreover, data indicated that not only could application completion rates be improved, but also that the student experience would be more positive if the time between application submission to acceptance were reduced. (S4.C1: Application Completion Rate Data)

Orientation and Welcome Week

In further support of the student experience, the university is committed to providing resources and experiences that facilitate the integration of new Lakers into campus life.

families are provided with information on a variety of topics, including: (S4.C1: Orientation Schedule, S4.C1:

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In addition to summer orientation sessions, new traditional-aged students also participate in the Mercyhurst University Welcome Week. Under the direction of the Campus Involvement Center, Welcome Week includes a wide variety of speakers and events aimed at immersing students in campus culture and introducing university mission identity. For example, the university typically provides invited speakers and an interactive Diversity University session. (S4.C1: Welcome Week Schedule) To create connections among students through peer-to-peer mentoring, Welcome Week engages experienced upperclassmen students, known as Laker Leaders, who mentor new students throughout the student integration process. (S4.C1: Laker Leader Welcome Week Training Materials) Central to engaging students with mission during Welcome Week is the Day of Service in which first-year students travel off campus to different parts of the city of Erie in service to non-profit organizations.

iMU

Rounding out a discussion of the university's commitment to ensuring the quality of the student experience for new Lakers is the iMU first-year course sequence. Detailed more fully in the description of *The Freshman Experience* in Chapter 5, iMU provides a foundation for new traditional-aged students. Through two 8-week, one-credit experiences, iMU 101 Introduction to Mercyhurst in the fall semester and iMU 102 Involvement in Mercyhurst in the spring semester, students are acclimated to campus resources, connected with mentoring through course facilitators and Laker Leaders, and introduced to the university's mission, history, Sisters of Mercy legacy, and traditions. (S4.C1: iMU Syllabus Samples, S4.C1: Laker Leader Job Description) To strengthen bonds between students and the campus community, iMU courses are taught by a wide variety of administrators and faculty, and course content is focused on nurturing the student's sense of place at the university, providing information and tools to support integration, and preparing the student for success in the four-year matriculation process. (S4.C1: iMU Facilitator List)

Supporting Academic Success: Lakers Learning

As detailed in Chapter 5, commitment to and support for student academic success through quality general education and academic programming is the university's highest priority. Through high quality academic services, which include a robust commitment to policies and procedures designed to foster persistence and completion, academic advising, the effective leveraging of technology to foster communication on academic progress, and targeted programming to support learning differences, the university strives to create an environment in which Laker Learners can thrive.

Academic Affairs

The Office of Academic Affairs (OAA) oversees all campus departments that are directly related to academics, both within traditional programming and in support of student learning. Such departments include the Registrar's Office, ODL, Academic Services & Support, Learning Differences, and Career Development. While

each of these departments is individually charged with enacting a set of policies and procedures designed to support the student experience, those policies and procedures are set and periodically reviewed by OAA.

The Registrar's Office, as the primary policy management unit for academics, is a critical student services area. In the spirit of the Student's First commitment, the Registrar's Office maintains and enhances student services as they relate to policies and procedures regarding credits awarded to students, both internally as well as through transfer, experiential learning, and other alternative approaches. Over the last five years, nearly all academic record and registration processes have been brought online, from course enrollment through Self-Service to the forms and signatures required for routine processes such as declaring a major. (S4.C2: Change of Major Form, S4.C2: Pass-Fail Declaration)

The evaluation of transfer and advanced standing credit is another example of an improvement that fosters collaboration across offices to support students. The university keeps a record of institutional data that reflects coursework equivalency as approved by academic department chairs. This information is reviewed on a rotating basis by the records manager in the Office of the Registrar to ensure the information is current. This information is also made available to transfer admissions counselors, who are tasked with reviewing official transcripts from the transfer institution and outlining transfer equivalencies on a student's program evaluation on Self-Service. Policies for evaluation and acceptance of credits either through transfer, experiential learning, prior non-academic learning, and competency-based assessments are outlined in each of the university catalogs. (S4.C2: Undergraduate Catalog – Transfer Credits, S4.C2: Graduate Catalog - Transfer Credits, S4.C2: Transfer Credit Equivalency Example) In addition to traditional transfer credits, the university maintains a system for reviewing and awarding Credit for Life Experience (CLE) that includes experiential and prior learning. The CLE process is a portfolio-based process that allows students to submit documentation supporting mastery of course learning outcomes that is reviewed by the associated academic department. The process begins when a department proposes a course that will count for CLE and submits information about the portfolio requirements and assessment rubric. Once approved by OAA, students may submit CLE documentation at any point during their enrollment. (S4.C2: Credit for Life Experience Application)

The Registrar's Office is also charged with maintaining student academic records. (S4.C3: Records Maintenance Policy) The transition to online forms has significantly improved both access to information for students and security and efficiency for the university. For example, convenient electronic access to the FERPA form makes it easier for students and families to obtain important information about FERPA and to submit forms. Information including FAQs about FERPA, annual notice (which includes FERPA guidelines), and quick facts to assist all constituents is readily available. (S4.C3 FERPA Website) Electronic filing also allows university personnel rapid confirmation of a student's FERPA status, further protecting student privacy. Other links on the Registrar's Student Hub to forms securing student privacy include the Letter of Recommendation Waiver, Work Study Non-Disclosure Agreement, Request to Prevent Disclosure (Directory Information), and the Authorization of Access to Student Educational Records form, through which students identify entities who may be provided access to their records. Once the form is completed and returned to the Office of the Registrar, the student's preferences are noted in Self-Service, the university's electronic student information platform, which makes this information available to student advisors as guidance for interaction with parents/guardians.

Academic Support

As its name implies, the Office of Academic Services and Support (OAS) is essential to supporting the student academic experience. Emphasizing the critical connection between student support and academic success, the associate vice president for academic support reports to the vice president for academic affairs and works closely with the college deans on the Academic Affairs Council. The services associated with OAS afford support for students at all levels of preparedness, including appropriate identification and delivery of remediation opportunities, ensuring ongoing student success, and providing services to further enhance the education of excellent students across campus.

Freshman Scheduling

A joint initiative between OAS and OIE, the Freshman Registration process ensures that incoming students are placed in first-semester courses that meet programmatic needs, while enabling students to explore areas of interest. Three pieces of information are used to build the freshmen schedules: a department-created list of required major courses for students during their first semester, a preferences survey that identifies areas of interest for incoming students, and data from the student's application including high school transcripts and submitted SAT/ACT scores. Importantly, the latter piece of information helps to ensure that students are enrolled in the appropriate first semester college writing course. Taken as a whole, the Freshman Registration initiative allows for the creation of more appropriate schedules that help students transition to college coursework and meet academic goals. (S4.C1: Freshman Course Placement Requirements, S4.C1: Freshman Preferences Survey, C4.C1: Freshman Major Requirements) Similarly, OAS provides targeted support to students unsure of which major to declare through Exploratory Student programming, which includes personal counseling as well as numerous events, including career fairs, major/minor fairs, and job shadowing. (S4.C1: Exploratory Student Programming)

Learning Differences

The Learning Differences program is a multifaceted service that provides learning support for all students while operationalizing the university's commitment to providing a focused support network for students facing additional challenges. The Learning Differences program works cooperatively with the university's Americans with Disabilities Act (ADA) staff to ensure that students with documented diagnoses have access to appropriate accommodations in their academic courses. The Learning Differences and ADA processes are managed through a dedicated software system designed specifically for this purpose. The AIM, LLC. Software allows students to submit an application for accommodation and include supporting documentation. The application can then be seamlessly reviewed, and the accommodations determined, documented, and implemented through the system. Features of the AIM LLC. system include a means for students to indicate accommodation disclosure preferences, automatic e-mailings for all facets of the process, and the organized and secure sharing of digitized textbooks. (S4.C1: Learning Differences Brochure, S4.C1: ADA Accommodations Application, S4.C1: Accommodation Notification Sample) In addition to ADA compliance, the Academic Support and Learning Differences staff works closely with students who self-identify as needing additional support. For example, the university offers a fee-based program to students and families, the Academic Advantage Program, that provides a variety of services and support throughout the academic year. In this program, students meet twice weekly with an Academic Support counselor to review current class progress, assess deficiencies, and plan for future

academic goals. In addition, with student permission, staff can meet with parents at midterm and at the end of the term to discuss the student's academic progress. (S4.C1: Academic Advantage Program Brochure)

AIM

A nationally recognized leader in providing support for learners on the spectrum and among the first higher education institutions to establish a learning differences program, the university is home to the Autism Initiative at Mercyhurst (AIM), which offers support and special career readiness opportunities for academically successful students on the autism spectrum. The mission of AIM is to facilitate and support the successful adjustment and progression of college students on the autism spectrum in all domains of college life, thereby broadening vocational opportunities and enhancing social and community engagement. The AIM program strives to accentuate each student's abilities within the academic, social, emotional, and independent living domains while building new skills in domains in which the student may be deficient. Students in this program have a weekly appointment with an AIM advisor who offers guidance in topics ranging from personal life skills to achieving success in the classroom. These weekly meetings allow the AIM staff to support students in an intentional manner and seek alternative resources on campus to foster student success. Each student's advisor documents the individual's growth and sets personalized goals throughout the academic year. As a supplement to this program, AIM coordinates with the Office of Academic Support and Learning Differences to offer a three-week residential summer program for interested incoming freshmen through which students enroll in an introductory REACH course and receive study skills support from the academic support team. The goal of the program is to maximize the potential for student success by introducing students to academic expectations and campus culture in a supportive environment prior to full enrollment in the fall semester. (S4.C1: AIM Program Brochure, S4.C1: CREATE Brochure, S4.C1: AIM Student Success Summary)

The Dual Advising Model

The dual advising model, introduced in

Chapter 5: Standard III - DESIGN AND DELIVERY OF THE STUDENT LEARNING EXPERIENCE, strongly evidences the university's commitment to supporting student success. Within this initiative, a new student is assigned two advisors, a faculty member in the declared major to assist with progress in the academic program and an academic success counselor to monitor overall integration to campus life and provide personalized academic resource referrals as needed. Students with declared majors are assigned academic advisors through the respective departments; students without declared majors are advised by skilled faculty members with extensive experience in working with exploratory students. The academic success counselors through the Office of Academic Support are assigned to students within designated academic colleges. Both advisors oversee student progress, and the university provides a structured opportunity for students to meet with their counselors and advisors on an Advising Day that is set aside each term. No classes are held on advising days to allow faculty members to meet with their advisees, plan schedules for the next semester, and discuss any changes to academic or post-graduation plans. (S4.C1: Advising Day Brochure)

Testing, Tutoring, and Writing Centers

In addition to providing direct student support through advising and resources for learning differences, the Office of Academic Support (OAS) sponsors critical services to support student academic success throughout the student's matriculation, including the Testing, Tutoring, and Writing Centers.

First, the Testing Center is a resource available to all Mercyhurst students. Housed in the main level of the library, the testing center provides opportunities for students to test in a proctored alternative location. Students who receive academic accommodations for extended time to complete exams and quizzes frequently take all exams in the Testing Center. In addition, students who need to make up a missed quiz or exam for any reason such as illness, approved university travel, or athletics may do so in the Testing Center with faculty permission. (S4.C1: Testing Center Overview) Second, consistent with a mission focused on educating students from all backgrounds, the Tutoring Center is a free service available to students in all REACH and introductory courses. The Tutoring Center offers one-on-one and small group tutoring with peer students who have demonstrated mastery in that content area. All tutors are fellow students, nominated and approved by Mercyhurst faculty and hired as paid tutors to assist their peers. In that way, the Tutoring Center serves to benefit not only the students who seek tutoring, but also those who are willing to share their knowledge. (S4.C1: Tutoring Center Overview) Finally, the Writing Center uses a similar model, connecting skilled writers with students who need help developing or honing their communication skills. The Writing Center supports all stages of the writing process, focusing on improving the student's ability to write and revise and supporting a variety of writing, including reflection prompts, research assignments, and lab reports. (S4.C1: Writing Center Overview)

Progress Monitoring

In addition to providing, as described above, services through dual advising for new students, academic support staff monitor academic progress for all students each semester through Self-Service, one of several tools utilized by the university within the Student Information System, Ellucian Colleague. Self-Service, available to students, academic advisors, and student support counselors, provides access to unofficial transcripts, enables students to plan and register for coursework, facilitates direct communication among stakeholders, documents enrollment actions, and confirms that progress is made toward meeting degree requirements. This information-rich, shared academic progress environment plays a crucial role in ensuring that student progress toward degree completion stays on track. The "15 to Finish," campaign, supported through the real-time information provided in the

university's electronic academic monitoring system, is an initiative designed to ensure that undergraduate students meet the requirements for Satisfactory Academic Progress (SAP) and are on track toward achieving the required number of credits to graduate on time. (S4.C1: Self-Service Screen Samples, S4.C1: #15toFinish Poster)

Another example of how academic support staff monitor student progress and provide timely outreach is the early alert system. All instructors are required to use the midterm grading and early alert system, available through Self Service, at least one time by the semester midpoint. When an alert indicates that a student is not meeting minimum expectations, academic counselors reach out to students directly. (S4.C1: Early Alert Process, S4.C1: Student Alert Email Sample) These electronic early alert processes are linked to an academic probation process designed to provide the support students need while ensuring satisfactory academic progress. For example, recognizing that some first year students struggle with the transition to the demands of college coursework, student support utilizes an academic warning status for freshman who earn between a 1.75 and a 2.0 GPA in the fall semester. Academic support staff provide counseling and connection to resources, including tutoring, the writing center, and, if appropriate, referrals to other offices, such as counseling or student financial services. While most students return to good academic standing within one semester, students who continue to struggle are moved to Academic Probation status. At the end of each semester when grades are certified, students are notified of their probationary status via a letter sent to the home address and by email to the student's campus account. (S4.C1: Academic Probation Overview)

Mercyhurst University recognizes that not all students fit the definition of a traditional student and is committed to providing a range of support options. Support for non-traditional students, such as veterans and associate degree students, is another example of the university's high level of commitment to student success.

For example, in 2020, when the university moved most of the associate degree programs to the Erie campus, the university retained the majority of Mercyhurst North East's academic support staff and relocated them to the Erie campus, ensuring that employees with the experience and particular skillsets for supporting the lower-income, nontraditional, and commuter populations that comprise many of these programs were available after the consolidation. In addition, as detailed below, Mercyhurst is a designated Purple Heart University and works closely with the Erie Veterans Affairs Medical Center to support military veterans in pursuit of their higher education goals. Similarly, all services available to on-campus students are also available to the distance learning population, including an online Writing Center, virtual tutoring, and appointments with academic counselors that can be conducted via telephone, Teams, or Zoom. (S4.C1: Academic Support Virtual Services Summary, S4.C1: Purple Heart University Documentation, S4.C1: Online Writing Center Brochure)

Honors and Prestigious Awards

While supporting struggling students is vital and particularly consonant with mission, the university also recognizes the importance of providing opportunities for excellent students to continue to grow and develop as learners and scholars. The Mercyhurst Honors Program plays an important role in supporting those students, offering an enriched intellectual collegiate experience, both in and out of the classroom, including special honors-level coursework, participation in an engaging community of like-minded peers, and opportunities to enhance leadership and professional skills. (S4.C1: Honors Program Overview) In addition, the Prestigious Award Program provides students with assistance in writing competitive applications for prestigious national and international awards in contemporary undergraduate and graduate scholarship, such as the Boren Scholarship,

the Goldwater Scholarship, the Fulbright Scholarship, and the Marshall Scholarship. The success of the Prestigious Award program is evident not only in that it produced Fulbright Scholarship Winners in 2018 and 2020, but more importantly in the way the Prestigious Awards Program allows faculty and staff to identify excellent students early and help them work toward applying for these prestigious scholarships, building on the faculty-student bond that defines the Mercyhurst education. (S4.C1: Prestigious Awards Program Overview)

Fostering Engagement: Living Laker

As illustrated above, the university provides substantive academic support for Laker learners both in and outside of the classroom. Recognizing, however, that the classroom is only part of the student experience, the university embraces a holistic approach to supporting student success for Lakers beyond the classroom. From the day new students arrive on campus until the day they graduate, student life, student services, and academic staff work together to develop, implement, and maintain programs, events, and resources to enhance the student experience and foster engagement. The quality and efficacy of these efforts are grounded in a university-wide commitment to the belief that Living Laker is an academic, social, and spiritual journey. Under the direction of the vice president for student life, the departments responsible for the co-curricular student experience work together to ensure that student life functions are regulated equitably by the same academic, fiscal, and administrative principals that guide all university departments and activities. The staff in the student life area provide students with rich, diverse opportunities to integrate into the university while developing the skills and attitudes for success as lifelong learners. Linked through the Student Hub, the Campus Life home page serves as an important center for accessing information and resources related to student life, including, for example, links to the bookstore, dining, and fitness center sites, as well as links to residence life, and campus involvement, and athletics.

Residence Life and Student Conduct

Mercyhurst University is primarily a residential campus. The Office of Residence Life and Student Conduct strives to provide a living environment that enables each student to develop holistically through educational opportunities. With so many of its students living in university housing, including freshman residence halls, a dedicated residence hall option for sophomore students, and a variety of apartment and townhouse settings, the university recognizes the importance of supporting the student experience outside of the traditional classroom.

Central to this commitment is the Office of Residence Life, which is charged with providing a residential environment that fosters student learning and well-being. Guided by an annually updated Student Handbook, the Office of Residence Life creates programming and establishes policies and protocols to encourage students to participate as active members of the university community, while maintaining acceptable standards of behavior and respecting the rights, privileges, and properties of others. (S4.C4: Student Handbook p.X) The Residence Life development model, designed in 2018 and implemented in 2019, is based on the acronym of A.N.C.H.O.R.S. and rooted in the Core Values of Mercyhurst University. There are seven pillars that guide program offerings:

Academic and Professional Development (Intellectually Creative);
Normalizing Diversity and Inclusion (Compassionately Hospitable);
Civic Engagement and Global Responsibility (Globally Responsible);

Health and Wellness (Reflectively Aware);
Ongoing Self-Exploration (Reflectively Aware);
Respect and Consent (Compassionately Hospitable); and
Socialization and Community Building (Socially Merciful).

In addition, Residence Life provides on-going staff training to ensure quality. For example, students who apply for and are selected to be Residence Assistants participate in annual training to nurture their skills as leaders, role models, mediators, and conduits for discipline on the campus. (S4.C4: RA Program Overview) Moreover, the Mercyhurst Student Conduct System is “intended to maintain the integrity of the University Mission and Core Values while fostering the ethical maturation of the student,” with a focus on “good judgment, responsible social stewardship, and concern for an improved quality of life for the whole community.” As such, the Conduct System including the staff, panels, administrative and board reviews, and consequences are designed to be developmental for students and not overly punitive. (S4.C4 Student Conduct Overview)

Campus Involvement

Overseen by an executive director, the Campus Involvement Center (CIC) fosters student success by providing opportunities to engage in social, leadership, and experiential activities. The CIC also works to connect students to Mercyhurst traditions, as well as to provide involvement opportunities, foster intellectual development, and mentor students through self-awareness. In these efforts, the CIC functions as hub for activities and communication for student engagement, including the Mercyhurst Student Government (MSG), Recognized Student Clubs and Organizations (RSCO), Student Activities Council (SAC), and the Multicultural Activities Council (MAC). (S4.C4: Campus Involvement Program Overview) Through the CIC, students have access to timely information and notifications about campus activities via the Weekender Hub page, which is updated frequently and available to students online. The page features an events calendar updated in real-time via multiple contributing offices around campus. Moreover, recognizing the specific needs of non-residential students, the CIC ensures that commuter students have access not only to events and information listed on the Weekender Hub page, but also to targeted initiatives, such as “First Friday” events and the “Comm-You-ter” monthly newsletter. (S4.C4: Campus Involvement Center Communication Samples)

In addition, through the CIC, the university provides students with opportunities for social growth and personal success through focused initiatives, such as the Leadership Development Program (LDP), which is a multi-level, non-credited program designed to recognize and develop the leadership potential of undergraduate students. A dynamic, high quality leadership training program, the LDP draws on live speakers, workshops, breakout sessions, and a variety of leadership activities. The Leadership and Outreach Coordinator evaluates the effectiveness of the program based on how many students persist through each level as well as which students become involved as leaders in one or more student organization on campus. (S4.C4: Leadership Development Program Overview)

Wellness

Committed to a holistic approach in providing opportunities for student learning, the university demonstrates a particular concern with physical and mental health and wellness, as evidenced in the 2021-2024 Strategic Plan which commits the university to action and investment on the “holistic health and wellness of students.” For example, the university offers support for students through the Student Outreach Committee (SOC), which is an

anonymous referral system used to provide wrap-around support for students who may be struggling socially, emotionally, and/or academically. This committee is charged with ensuring that at-risk students receive outreach and access to whatever support they may require. (S4.C1: Student Outreach Committee Overview) Established in 2009 in response to a documented increase in the rates of anxiety and depression among students, including suicidal ideation and attempts, SOC provides a crucial intersection that links reported concerns about student well-being with the university resources available to address those concerns and the students themselves. Since August of 2019 SOC has received reviewed and followed up on one hundred separate referrals (as of 11-29-20).

As with SOC, many of the unique ways through which the university supports wellness as central to the student experience are collaborative efforts meant to yield explicit and effective outcomes. For example, in (year?), planning for improved student health outcomes resulted in three multi-departmental teams: a coordinated community response team for interpersonal violence, sexual assault prevention and education; an athletics and counseling center for wellness and mental health; and a measles vaccine action team. As another example, departments in the student life area collaborated on an approach to offering dining, transportation, recreation, and activities opportunities during university break periods for students unable to leave campus at those times. (S4.C1: Campus Services During Breaks)

Evidence of a robust commitment to supporting student wellness can also be found in the university's significant attention to and investment in providing services to students facing unique challenges. For example, the Mercyhurst Counseling Center, which offers free support to all students, strives to respond compassionately and professionally to the psychological, relational, emotional, and spiritual issues of students. As detailed on the Counseling Center's Hub site, the Center offers a variety of services to meet the needs of individual students, including teletherapy, individual sessions, and group programming, as well as emergency services and a designated "urgent hour" to support students in crisis. As with all university departments charged with protecting sensitive student information, the Counseling Center's policies uphold the confidentiality of the individual student in a manner consistent with professional ethics and community laws. (S4.C1: Counseling Center Overview)

In addition, the university, through the Office of Veterans Services and in keeping with its designation as a Purple Heart University, is committed to providing the specialized counseling support students coming from military service might require. (S4.C1: Veterans Services Overview) In addition to assistance provided through the university's the counseling center, the university recently collaborated with the local Erie Veterans Affairs Medical Center (VAMC), located blocks from campus, to help nurture the mental health of the university's veteran students. The Erie VAMC sends Certified Peer Specialists to campus several times each semester to meet with veterans seeking support in a casual setting. These specialists are veterans themselves, specifically trained to help veterans cope with coming back from deployment, adjusting to civilian life, or other challenges.

Finally, recognizing that "Living Laker" can be many things to many different students, the university fosters wellness through its efforts to foster diversity and inclusion as values consistent with the mission. As described in ***Creating a Climate of Respect***, among these efforts, the university supports:

- programming and pastoral presence as an essential support for students who might otherwise feel marginalized on campus;
- the LGBTQIA Allies program to promote acceptance of all students across the range of sexuality and gender diversities;
- opportunities to engage deeply with the outside community through service;
- support for those struggling financially through the Mercy Market.

In the spirit of the Mercy Mission, all services are offered in a way that maintains the dignity of the individual and recognizes that students cannot achieve their educational goals without first having basic needs fulfilled.

Athletics

The university recognizes that with nearly xx% of the undergraduate students identifying as student-athletes, the need for quality student support for students striving to balance athletic and academic responsibilities is imperative. In addition to club sports, the university intercollegiate athletics program is comprised of 25 varsity sports, with the Lakers fielding teams in 13 women's sports and 12 men's sports. Two of the programs compete at the Division I level (men's and women's ice hockey) while 22 participate on the Division II stage. As detailed on the Mercyhurst University Athletic Website, the athletics program is overseen by an executive director and supported by eight administrative positions, including the associate director/woman coordinator, the assistant athletic director for student health and wellness, the Title IX coordinator, and a designated compliance assistant. (S4.C4: Athletics Organizational Chart) As part of the overall university structure, the athletic department is regulated by the same policies and procedures as all other departments at the institution, including participation in standard university budgeting processes, compliance with all human resources policies, and maintaining consistent supports and services for student athletes. (S4.C4: Athletics Handbook)

Academically, the program demonstrates impressive success both in student GPA and degree completion rates. Moreover, the university is committed to a holistic approach to supporting student-athlete personal development. Much of this success can be attributed to the level of support received from not only the coaching staff, but also the numerous athletic administrators and staff. A key component of this support is the position of Assistant Athletic Director for Health and Wellness, established in 2018 to develop and implement programming for student-athletes aimed at interpersonal growth and physical and mental wellness. As a health and wellness advocate, the director works with coaches and athletic trainers to ensure that student-athlete mental, physical, and nutritional needs are essential considerations in all aspects of athletic programming, from conditioning to training to scheduling and education.

As another example of support for developing the whole person, athletic teams engage with the university's core values as ambassadors of service through their efforts in community service, such as:

- the hockey program is involved in the Gliding Stars program; the softball team works with the Sports Medicine department each year to sponsor a 5K race to benefit a local charity;
- the volleyball team sponsors BINGO with veterans at the VA hospital;
- and football players volunteer to read to elementary school children;
- the baseball team works with three St. Luke's Elementary School events annually to assist with fundraising for school athletics.

Creating Connections: Lakers for Life

As demonstrated above, Mercyhurst University is committed to providing substantive support for students from recruitment and admission to the early days of integration to the wide range of student experiences through the years of matriculation and graduation. Essential to this support is the recognition that the Laker experience is one based on relationships: relationships with the faculty who teach; connections with the administrators who serve; and extraordinary bonds with fellow students who learn and grow together. In this spirit, the university is committed to providing support for students well beyond the years they spend on campus. The goal is to support Lakers for Life: students who upon graduation live as examples of and proud ambassadors for the university mission and core values and for what the Mercyhurst University education has to offer. The Office of Advancement and Alumni Relations and the Career Development Center (CDC) play perhaps the most prominent roles in providing support for Lakers for Life. Both offices help students create connections inside and outside of the gates.

The CDC supports students throughout their matriculation with the goal of post-completion placement. Centered on a development model that encompasses the students full academic experience, the CDC provides career exploration and job search links, sponsors job and graduate school fairs (both on and off campus), and facilitates student experiential learning opportunities, including internships. Career development staff also offer workshops on resume writing and interviewing techniques. These efforts often lead to job offers or acceptance to graduate schools prior to a student's graduation. In addition, the CDC offers free services to all Mercyhurst alumni. Whether alumni are changing careers or looking for the next step up, staff are available to alumni to assist with the job search process, provide interview tips, and resume and cover letter review. The CDC also fosters relationships between alumni and current students through a variety of programs, including sponsored internships facilitated through the Handshake platform. (S4.C1: Career Development Center Overview)

Prior to and after a student's degree completion, the Office of Advancement and Alumni Relations fosters relationships that encourage the development of connections leading to lifetime engagement with the university. For example, students are provided opportunities to play key roles on the senior gift committee, generating funds for a scholarship or project approved by their peers, and introducing those students to the concept of philanthropy and giving back to the university. Alumni are connected through an alumni newsletter quarterly to keep them abreast of all things happening "on the hill." In addition to an electronic newsletter, the Mercyhurst Magazine is published several times each year, featuring in-depth articles on university events, accomplishments, and programs, as well as alumni updates for graduates going back decades. The annual university homecoming and alumni weekend events bring alumni back to campus to engage with each other and to learn about and nurture the university growth and development. Moreover, the university commitment to Lakers for Life goes far beyond contact and opportunities for alumni to give back. Through programs which provide advanced education to alumni at discounted rates, such as the Organizational Leadership Graduate Program Ten Courses for \$10,000 program, the university assists alumni in up-skilling in response to an evolving employment market and in critical career transitions, for example, the employment challenges presented by global pandemic. (S4.C1: Alumni Communication Samples)

and faculty members attend to interact with students and answer questions. During this session, students also review their fall academic schedules and are instructed on how to schedule individualized academic support counseling meetings, if needed. The hybrid approach also allows for laker live chats for students who choose to participate virtually. As documented in the Orientation Team Minutes, staff representing key student service areas collaborate to ensure that students are fully supported

Key Findings

- The university clearly demonstrates a deep respect for the importance of supporting the student experience by development of a university-wide “Lakers for Life” approach, which allows the institution to coordinate efforts at recruiting, onboarding, and supporting students through their matriculation and beyond.
- The university has successfully invested in and made use of information technology to enrich the student experience, such as the CRM system, Slate, to foster open, timely, and effective communication between potential students, actual students, and alumni and various units, ranging from Admissions, Student Life, Student Academic Success and Support, Student Financial Services, to Alumni Relations
- Since the inauguration of the Students First program in 2014, the university has made impressive progress in building a culture of “Seeing the Whole Student” through critical resource investments and program development to enhance connections among departments supporting the student experience. For example, the approach to student advising, providing each student with a faculty advisor in the discipline as well as a professional advisor from the staff of Academic Services and Support, has enabled the university to respond quickly to student difficulties as a matter of prevention when possible.

Opportunities for Improvement and Innovation:

1. It is recommended that the university consider how additional resources, particularly online options, could facilitate more efficient tracking and communication with graduates.

2. It is recommended that the university build on the progress made to date in student services assessment, providing training and resources necessary to assist units in targeting areas for assessment, collecting data, and interpreting and operationalizing assessment outcomes.

draft

Chapter 7: Standard V – Educational Effectiveness Assessment

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

Overview

Mercyhurst University meets the requirements of Standard V. A full description of the ways Mercyhurst University meets the five criteria and all applicable sub-criteria of Standard V, as well as the Requirements of Affiliation 1, 2, 8, 9, 10, and 15, are presented throughout this chapter.

A comprehensive assessment program is one that provides clearly stated and appropriate goals that align with the institution's stated mission. Mercyhurst has built a widespread, ongoing method of assessment of educational effectiveness that supports the goal of developing student success and academic excellence. Central to this purpose is the university's faculty, who oversee its academic programs, maintaining a commitment to discipline, pedagogy, and student learning objectives. Throughout the university, faculty and staff work in tandem to build and improve the university's understanding of student learning to achieve academic success through assessment, programing opportunities and services, and scholarship efforts.

Begun in 2013, a transformative approach to assessment has occurred at the university. From the university's mission, through department learning objectives and outcomes to the academic support initiatives, a substantive shift has occurred that has produced a thoughtful and methodical approach to assessment. Use of assessment to improve curriculum and pedagogy has become a fully integrated part of faculty work, from the use of information to improve individual instruction and course delivery to the design of new courses and programs. Throughout the process, the information is utilized to allow faculty and departments to make informed instructional decisions that improve the academic experience and promote students' achievement of learning outcomes.

Supporting Assessment

Over the past five years, Mercyhurst University has operationalized institution-wide assessment of student learning and achievement. Critical to this process has been the creation of a campus office specifically charged with overseeing assessment activities, systematic processes for assessing the assessment, and resources and professional development opportunities for faculty and staff specifically centered on enhanced knowledge of and skills in assessment and institutional effectiveness improvement. In 2016, the university consolidated its academic assessment operations within the Office of Institutional effectiveness (OIE). Funded as a department within the Office of Academic Affairs, the OIE supports the mission, values, and strategic goals of the university by providing internal and external constituents with timely and reliable information regarding the institution's operations and performance. As part of OIE, the departments of Assessment, Accreditation, Institution Research, and Distance Learning, along with the Registrar's Office, support academic and administrative departments in the collection, use, and reporting of useful information that inform decision-making at the university. As part of its operations, the OIE functions to:

- assess and document the university’s progress in achieving its short and long term strategic goals and effectively communicate accomplishments to its various constituencies;
- meet the data reporting requirements of outside entities;
- support efforts to ensure that the university complies with all applicable rules, regulations and laws;
- maintain information systems that enable the university’s academic and administrative leadership to effectively monitor assessment results.

The OIE coordinates regularly with departments to ensure that assessment processes are both effective and efficient. Specific examples of OIE support for efforts to improve educational effectiveness through professional development activities related to assessment include the Assessment Handbook, the Assessment and Accreditation Hub page, and the Assessment Institute. The Assessment Handbook provides comprehensive information on academic assessment processes at the university, including planning, development, and implementation of assessment processes, such as annual assessment reports, action plans, and five-year self-studies, as well as timelines and schedules. (S5.C3: Assessment Handbook) The Assessment Handbook is made available to stakeholders through the Assessment and Accreditation Hub Page, which also features a robust slate of assessment support resources, including links to forms and documents, links to additional resources, and assessment FAQs, as well as separate resource pages for both accreditation and institutional research. (S5.C3: Assessment Hub site) Similarly, The Loop, a bi-monthly newsletter introduced in early 2021, offers resources, highlights examples of good assessment practice on campus, and updates faculty and staff on any changes to assessment policies or processes. (S5.C3: Assessment Newsletter Samples) In addition, targeted assessment support is provided to academic departments during OIE’s annual Assessment Institute, a day-long event held just before the start of the Fall semester. The Assessment Institute includes an informational presentation from the Assessment Coordinator and breakout sessions in which faculty work collaboratively to develop a deliverable as assigned by OIE. In previous years, faculty have worked together in breakout sessions to generate reports outlining their senior capstone experiences, identify essential course-level Global Learning Objectives (GLOs) as described in IDEA Course Evaluations, and update assessment plans and curriculum maps. (S5.C3: Assessment Institute Overview) In addition to online resources and the Assessment Institute, the OIE, through its designated assessment coordinator, sponsors individual meetings with department chairs to review assessment plans and brainstorm solutions to any assessment challenges reported by faculty.

As demonstrated below, Mercyhurst University can evidence significant progress both in providing the necessary support and resources required to ensure quality assessment information and in creating pathways to ensure that assessment information is used to inform decision-making.

Framing Curricular Goals

Mercyhurst University provides succinct educational goals at both the institutional and departmental/programmatic levels that are intertwined within the university mission and core values. These educational goals are arranged from broad, comprehensive goals, such as those found within the university mission, vision, and core values, to more granular goals found within course syllabi.

The primacy of the mission, vision statement, and core values in all aspects of university operations is explicit in the university’s clear commitment to a consistent set of educational goals that are reflected within and reinforced by the educational experience. For example, the vision statement states that “Mercyhurst University

seeks to be a leading higher education institution that integrates excellence in the liberal arts, professional and career-path programs...". This statement ties directly into the university mission that states, "where the beauty and power of the liberal arts combine with an appreciation for the dignity of work." Further reinforcing the interconnected nature of the university's educational goals, the core values of the institution, which call on its community to be socially merciful, globally responsible, intellectually creative and reflectively aware, coordinate with the university mission that supports an education which nurtures "students whose choices, in life and work, will enable them to realize the human and spiritual value embedded in everyday realities and to exercise leadership in service toward a just world." SITE VISION STATEMENT AGAIN

Narrowing the focus from broad vision to institutional planning, the university's current and previous strategic plans are further evidence of the explicit link between educational goals and the mission and core values. As detailed in Chapter 3, the university's 2018-2021 Strategic Plan, "Renewal Through Mercy," (S5.C1: 2018-2021 Strategic Plan) aligns the university's strategic goals with the university mission. The themes and objectives in this plan are grounded in the university mission, including renewing the commitment to a Mercy education, campus life, the university's resources, processes and infrastructure, and Mercyhurst North East. Within these themes, the plan reflects critical connections to mission values through concrete objectives relating to, for example, supporting student success, reaching out to non-traditional students, fostering diversity and inclusion, and improving health, safety, and well-being across the university communities.

Similarly, the institutional goals targeted in the 2021-2024 Strategic Plan, "Mission Inspired, Future Ready," are organized around the categories of the university core values. (S5.C1: 2021-2024 Strategic Plan) Resonating with the university's mission and core identity, the goal of being "Intellectually Creative" frames initiatives that reaffirm the centrality of the liberal arts, seeks to ensure high quality programming in both academics and student life, and prioritizes the student experience and student success as critical to meeting the mission mandate. Within "Reflectively Aware," the plan operationalizes the university's mission and core values, focusing on holistic health and wellness, supporting equity, inclusion, and justice, and addressing support for the whole student experience as essential to fulfilling the university's particular responsibility as an institution founded by the Sisters of Mercy. Finally, "Foundationally Secure," frames initiatives around the university's critical identity, recommitting to the Mercy identity, supporting the dignity and value of human connection and interactions in operations, and ensuring institutional health and financial sustainability.

Further narrowing from institutional to program level, the framing of educational goals within the context of the mission, vision, and core values is echoed and expanded in the articulation of goals within departments and programs. This resonance can be seen clearly in the department and program mission statements that provide the foundation for academic assessment. As clearly articulated in the undergraduate and graduate course catalogs, as well as in each department's academic assessment plan, all academic departments articulate mission statements imbued with the ideals articulated through the university mission. (S5.C1: Undergraduate Catalog - Business; S5.C1: Graduate Catalog – Teaching Excellence) For example, the department mission for the undergraduate business program statement states, "Graduates will embrace Mercyhurst's core values of respect and tolerance for people and their ideas, and dignity in the treatment of all workers" and embrace "a collaborative approach to learning." These statements correlate with the university mission which highlights "an appreciation for the dignity of work" and grounds the education enterprise "in the strength of its student-faculty bonds." Similarly, the mission statement for the graduate program in secondary education states that "students

in this program demonstrate strong pedagogical skills, leadership and service to others throughout the program,” which correlates with the university mission’s “appreciation for the dignity of work and a commitment to serving others.” (S5.C1: Program Outcome Statement Samples)

Finally, mission, values, and institutional objectives are connected to the educational goals that drive student learning at the course level, as evidenced through course syllabi, which are available for review in the Syllabus Repository located on the Hub. The clear link between institutional and department educational goals and the processes of program assessment, including annual assessment reports and curriculum mapping, are articulated to students through course syllabi and communicated to the larger community through the syllabus repository. For example, a syllabus for a course in the department of criminal justice, within the Ridge College, makes explicit the wider department educational goals by stating, in addition to the course description and the specific course objectives, the student learning outcomes for the Department of Criminology and Criminal Justice Program (Kirchner, CRJS 205-01FTE, Spring 2021). In an accounting course offered within the Walker College of Business, the syllabus details the department’s wider Student Learning Outcomes and Course Specific Objectives with the business core curriculum and makes explicit educational goals within four student learning outcomes, including oral and written communication, working in teams, solving business problems, and applying theory and practice to functional areas of business (Moore, ACCT 102-01, Spring 2021). ACCT 102-01, Spring 2021). (S5.C1: Syllabus Samples)

Implementing Systematic Educational Goals Assessment

Mercyhurst University is committed to developing and implementing substantive and effectively managed processes leading to meaningful educational assessment. Accordingly, the university employs a variety of levels of reporting and assessment to determine whether institutional and program outcomes for students, essential to continuous improvement, are being achieved. The commitment to effective assessment processes is clearly evidenced in the university’s comprehensive approach to academic program assessment. Through these processes, academic department faculty define curricular goals, ensuring high standards in the validity of assessments and the determination of whether students are achieving institutional and programs goals. The Assessment Handbook provides clear direction for all faculty on the process for both annual program assessment and the five-year self-study process including the identification of student learning outcomes, the mapping of outcomes to learning experiences (curriculum maps), and a specific timeline for assessment planning and reporting. Faculty within the individual academic departments and programs drive this process, supported by the Office of Institutional Effectiveness (OIE). (S5.C2: Assessment Handbook)

Each academic department at Mercyhurst is required to have a current assessment plan and curriculum map on file with the Assessment Office. Department and program mission statements serve as a bridge between the university mission and the concrete outcomes and specific field knowledge within the department’s assessment plan. Grounded in that mission, each assessment plan articulates departmental learning outcomes, identifies which courses and with what assignments/activities the outcomes will be assessed, determines how often the outcomes will be assessed, and designates whom will be responsible for collecting, analyzing, and communicating assessment results. Department assessment plans and curriculum maps are updated as needed with assistance from OIE. Assessment activities within academic departments are reported to OIE in two

formats: annual assessment reports and five-year self-studies. (S5.C2: Assessment Plan Samples, S5.C2 Curriculum Map Samples)

Academic departments submit annual assessment reports to OIE, using a format that has evolved through close collaboration between OIE and the departments. Prior to 2019, academic departments submitted annual assessment reports to OIE through a standardized matrix that provided an overview of what learning outcomes had been assessed and when, as well as whether students met intended targets. If departments identified an unmet outcome based on a previously set standard, departments submitted an action plan to address appropriate changes going forward. Although these reports provided OIE with documentation that assessment work was happening across academic departments, the reports proved to be less useful for faculty, many of whom found the matrix to be cumbersome and difficult to understand. (S5.C2: Pre-2019 Annual Assessment Report Samples) To streamline the annual reporting process and make it more meaningful for departments, in 2019, OIE replaced the annual report matrix with a narrative format. Instead of entering assessment data into an Excel file, faculty completed a Microsoft Form that asks what learning outcomes had been assessed during the 2018-2019 academic year, what evidence for student learning had been collected, and what questions faculty had about their students going forward. After the forms were submitted, the assessment coordinator met with department chairs individually to discuss departments' assessment efforts, answer questions, and offer guidance. These meetings proved crucial to providing faculty with the meaningful feedback that was missing from the previous annual reporting process. (S5.C2: 2019 Annual Assessment Report Samples)

When the 2019 assessment reporting form was created, OIE intended to use the same format for the 2019-2020 academic year as well. However, the COVID-19 pandemic and the sudden shift to remote learning in March 2020 forced OIE to change course. Because of the unusual circumstances of the Spring 2020 semester, OIE created a more reflective assessment reporting format. Departments were asked to work together to complete a brief questionnaire describing what, if any, changes were made to their assessment processes, why those changes were made, and who was responsible for making them. (S5.C2: 2020 Annual Assessment Report Samples) Using this reflective model, departments were able to identify the learning outcomes, course policies, and assignments that were most beneficial to their students and most important for their programs, information that they can use to better their assessments moving forward. (S5.C2: Assessment Growth Example)

Building on the clear success of the reflection-based model of annual reporting, the 2020-2021 annual assessment reports centered on use of assessment. Departments were asked to describe changes that led to overall improvement, for example, in courses through adjusting content delivery strategies or in programs through sequencing of courses and material. By shifting the focus of assessment reporting to one critical aspect of the assessment cycle, faculty were able to embrace the meaningful use of assessment data, which ultimately provided a more robust description of the full assessment cycle. While the limiting nature of the standardized spreadsheet format restricted in some ways the potential for communication, the narrative nature of more recent reporting promoted more effective sharing of information about programs and their assessment processes and results. (S5.C2: 2021 Annual Assessment Report Samples) OIE, in consultation with departments, continues to evaluate and adjust annual assessment processes as part of the period assessment of effectiveness of institutional assessment processes.

In addition to annual assessment reports, each academic program unit is required to complete a five-year self-study. As detailed in the Assessment Handbook, self-studies consist of seven sections that provide an analysis of a department's overall functioning. (S5.C2: Assessment Handbook) Included in the self-study are the department's mission statement, financial and material resources, current trends and issues within their disciplines, and an outline of the expertise, service, and scholarship of department faculty members, as well as any internal or external funding associated with faculty research. With data provided by OIE, departments also evaluate retention rates, describe faculty support of advising and mentorship, outline alumni satisfaction, and, if available, report graduate employment status. (S5.C2: Departmental Data for 5-Year Self Studies - XXX) Within the five-year self-study process, departments also provide an overview of student learning outcomes assessment over the previous five years and critically examine both the evidence collected and the level to which learning expectations were met. Departments also describe what changes, if any, were made if outcomes were not met and if these changes were successful. Departments may also use this opportunity to determine whether the curriculum map or assessment plan needs to be adjusted for the upcoming assessment cycle. (S5.C2: 5-Year Self Study Samples) Prior to 2021, five-year self-studies typically included an external review component. This external review was meant to provide departments with valuable insight and suggestions from individuals most familiar with their disciplines. However, during the scheduled OIE review year in 2020-2021, it was determined that the external review component was not meeting the intended outcome and should be eliminated. Institutional limitations in funding for external reviewers, time constraints inherent in the process, and difficulty recruiting impartial and qualified reviewers led to the external review component serving as a distraction from the larger self-study goals. In the spirit of ongoing assessment, the external review component will be revisited at the end of the next self-study cycle. (S5.C5: External Review Summary)

Another example of the university's commitment to developing effective assessment processes can be found in the robust and varied approach to systematic assessment of student learning beyond the classroom. Grounded in its mission, the university strives to prepare student for meaningful lives, careers, and further educational goals through a range of activities and experiences and recognizes the critical importance of assessment in ensuring the educational effectiveness of these experiences. As detailed in **Chapter 3: Standard 1 – Mission and Goals**, the outREACH initiative is a systematic strategy for the assessment of institutional effectiveness in mission integration. The curricular framework of outREACH incorporates a set of specific student learning outcomes that are assessed at three separate points in the student matriculation. These student learning outcomes operationalize the university mission commitments and capture critical aspects of the mission and core values with particular focus on understanding, appreciating, and applying mission values, diversity, community, and service to others. (S5.C2: outREACH Learning Outcomes, S5.C2: outREACH Assessment Results) As another example, the university utilizes assessment to ensure the quality of programmatic experiential learning requirements. For example, during clinical rotations, pre-licensure nursing students are evaluated weekly using the Nursing Clinical Evaluation Form. Along with formative assessment, students must demonstrate satisfactory clinical performance/competence at the end of each clinical rotation prior to progressing to the next clinical course. These formative and summative assessment forms, as well as others like them, demonstrate that organized and systematic assessment of goals are occurring in settings outside the traditional classroom. (S5.C3: Nursing Clinical Evaluation Form)

Finally, the university demonstrates its commitment to assessment toward continuous improvement through the regular collection and evaluation of critical data, including, for example, post-graduation surveys and licensing data used to track and identify student professional success after degree completion. One example is the First Destination Survey, used to gather information from graduating seniors about their employment status and experiences after graduation such as continuing education. (S5.C3: First Destination Survey) Conducted electronically through Handshake, the survey is managed by the CDC, and the data is shared with OIE. As another example, licensure information is collected and evaluated by the university as part of assessment toward strategic program development and improvement. (S5.C3: First Destination Survey Results) Additionally, professional licensure exam data is gathered for pre-licensure associate degree programs in the health professions, such as nursing, and graduate programs that require licensure, such as the physician assistant program. Program certification pass rates and completion rates are posted on each program's web page and updated on an annual basis. Licensure pass rates above the benchmark provide evidence of successful educational preparation of students for successful careers. (S5.C3: Physician Assistant Placement Rates)

Harnessing Assessment Information

As the examples discussed above show, Mercyhurst University demonstrates a substantive commitment to developing systematic assessment of educational goals. Moreover, the university frames these strategies toward acquiring meaningful information that informs and inspires change for the better. Recognizing that the value of assessment lies in its power to inform decision-making and support continuous improvement, the university prioritizes the link between data-driven assessment and the educational programs and initiatives under measure and review. Three examples serve to illustrate the university's commitment to using assessment information to improve the student learning experience and inform decision-making.

Academic Program Revision

The use of information derived from substantive assessment is evidenced in the university's academic program revision processes. As detailed above, academic programs complete self-studies every five years, including the assessment of program activity in the context of the university and unit missions, personnel, resources, and outcome data. Moreover, programs research trends in the field, elicit external review, and complete action plans. Drawing on the information produced within these rigorous assessment processes, as well as in the annual evaluation process, programs collaborate with OIE to develop and implement revisions or improvements identified by faculty in the program. For example, the Department of History had eliminated a requirement from the program, but upon assessing programmatic learning outcomes in the senior capstone course, the department found a deficiency in outcomes achievement related to that course content. As such, the program was revised to reinstate that course. (S5.C3: Course Revision Example - History). As another example, the Department of Chemistry used assessment results to change its program structure to incorporate structured research coursework and opportunities for students. (S5.C3: Program Revision Example - Chemistry)

Further, to ensure that changes to academic programs are grounded in data-driven assessment, the university employs a rigorous process for making changes to academic programs. Proposals for new or changes to existing programs and courses require the use of online forms that document clear links between proposed changes and academic assessment. For example, the New Program Application requires that the program learning outcomes be mapped to the department's assessment plan and supported by a substantive needs-analysis and longer-

term enrollment projections. To ensure communication and an information-rich environment in academic program development, review, and revision, academic program additions or substantive changes at the department level must receive approval from the college dean, OIE, and the Faculty Senate's Academic Planning and Assessment Committee (APAC). The vice president for academic affairs makes the final approval decision. (S5.C3: New Program Application) Similarly, changes to academic programs require formal review, including the evidence used to substantiate the change. (S5.C3: Program Change Form)

Course Evaluation

In addition to departmental-level evaluation of programs and curricula, academic departments are able to draw on outcomes from the assessment of individual courses to improve educational effectiveness. Course-level evaluation happens through a number of mechanisms, including student ratings of instruction, faculty review of course learning outcomes, and university-wide processes for evaluating teaching effectiveness.

Students provide feedback on their learning experiences through student course evaluations. Prior to 2018, the university required all faculty to conduct course evaluation using the *SIRII* platform. Since 2018, the university has employed the IDEA diagnostic instrument and requires that all courses be evaluated. Through these course evaluations, faculty are provided with both quantitative and qualitative feedback about student learning and overall satisfaction with the course content and delivery. IDEA evaluations of individual faculty members and courses are shared with the respective department chairs, associate deans, and deans, who monitor data relating to department designated and ranked student learning outcomes. (S5.C3: SIRII Instrument, S5.C3: IDEA Diagnostic Instrument, S5.C3: Sample IDEA Results)

In addition, as a part of meaningful evaluation of student learning, faculty members engage in ongoing assessment of learning outcomes within individual courses. Such engagement with assessment at the course level enables faculty to improve both individual course structures and larger program-level curricula. The Applied Forensic Sciences department, for example, discovered through indirect assessments that students were not being provided an opportunity to reflect upon and synthesize their learning over their entire program. To correct this issue, the department began requiring all students to complete a comprehensive capstone course (S3.C5: Applied Forensic Sciences Example of Use). Ongoing assessment at the course-level also helps faculty improve methods for collecting evidence of student learning. For example, the Religious Studies department discovered that the research paper previously used for assessment of program-level learning outcomes was not providing a full picture of what students in the program know and are able to do. In order to gather more meaningful data about student learning, the department moved to an eportfolio-based assessment tool that requires students to respond to a series of reflective prompts that faculty evaluate using a detailed rubric (S3.C3: Religious Studies Example of Use). Finally, some aspects of the faculty evaluation also inform the ongoing assessment of educational experiences. This is evident through the focus on teaching effectiveness in the faculty review process. Classroom observations, as documented through the Classroom Observation Form employed by all four colleges, provides substantive feedback on teaching effectiveness, focusing on student engagement, communication with students, lesson strategies, pedagogy, course content, and an overall evaluation. (S5.C3: Classroom Observation Form)

Support Services Review

Assessment information also plays an important role in evaluating academic support services. For example, the Hammermill Library collects data on library services and space occupancy for planning and potential enhancement of the academic library through targeted data gathering tools, such as the Library Log Report, created using the LibWizard product by Springshare, which permits the library to conduct an intentional hourly count through the library building which can be entered into the reporting system. Over time, this data is gathered to assess the occupancy of the building during days, weeks, and hours to develop predictability of peak usage and to inform decision-making as to staff coverage requirements. (S5.C3: Library Overview)

Using Assessment to Inform Decision-Making

Recognizing that adequate and well-chosen resources are essential to the development, implementation, and use of assessment, the university is committed to providing support for and documentation of institutional effectiveness. Central to this commitment is the university's success over the last decade in normalizing assessment and evaluation practices as essential to growth and planning for institutional improvement, progress that can be seen most clearly in the strategic planning processes. The previous strategic plan demonstrates the university's commitment to building the mindset and infrastructure needed to center institutional effectiveness improvement as central to future growth and development. For example, Goal III in the Strategic Plan 2018-2021, *Renewal Through Mercy*, specifically addressed the enhancement of assessment results to fuel planning for programming and services through Goal III and action steps 3.2 and 3.3. In addition, "Goal I: Renew Our Commitment to a Mercyhurst Education," with strategies 1.1 and 1.5, emphasized the use of assessment results to drive programming. Secure in that foundation, Strategic Plan 2021-2024, *Mission Inspired, Future Ready*, indicates the university's internalization of assessment and institutional effectiveness planning with nearly all goal areas grounded in data and information-based initiatives, including the development of a comprehensive student outcomes dashboard to continuously monitor retention rates, graduation rates, and career/graduate school placement rates by student cohort and subgroups. (SV.C3: 2018-2021 Strategic Plan 2018, S5.C3: 2021-2024 Strategic Plan)

The Annual Budgetary Planning process involves long and short-term planning and makes use of an array of assessment data. For example, after analysis of assessment data and in consultation with department chairs, the college deans recommend modifications to programmatic and service-related budget items using additional funding request forms submitted to the area vice president and reviewed by the university's budget team as part of budget planning and development. Emphasizing information-informed decision-making, each form requires an explanation of anticipated outcome(s), including return on investment and how the budgetary increase supports the university's mission and strategic plan, enhances revenues, and/or reduces expenses. The forms outline anticipated increases to existing contractual commitments, as well as detail recommendations for new funding (recurring or nonrecurring, and capital). (S5.C3: Additional Funding Request Forms)

More evidence of the relationship between assessment results and programmatic budgetary planning can be found in the of the Five-Year Self-Study processes. As detailed in the Assessment Handbook, the Five-Year Self-Study allows programs to determine their degree of progress and achievement on program goals and learning outcomes and how the overall program mission ties into the larger university mission and strategic plan. As related to planning and budgeting, programs also complete a comprehensive review of enrollment, resources,

and trends. For example, the most recent Five-Year Self-Study for the Organizational Leadership Department provided a data-based analysis indicating that the number of courses needing to be offered was placing strain on existing faculty and recommending the hiring of additional faculty. However, the data also indicated that enrollment in individual courses was decreasing in the in-person sections but not in the online sections. From that study, the college dean, working with the OAA and the chair of the department proposed the transition of the program to fully online, which was implemented in 2019, as well as the revision of the program core requirements to create more flexibility for students while easing strain in terms of the numbers of courses needing to be offered each term. (S5.C3: Organizational Leadership Self-Study)

Another example of how evidence and assessment was used to inform decision-making and ensure sufficiency of resources centers on the transition between core curricula in the 2015-2016 and 2016-2017 academic years. When it was proposed that all students would benefit from participating in the new core curriculum due to the reduced number of requirements and increased flexibility, the university considered adjusting the graduation requirements for all students at the junior level and below. While the benefit for students could be effectively argued, there was a concern that since course offerings for the new curriculum were dependent on past and current enrollments in the prior courses, the shift might create uncertainty in schedule planning. To mitigate these challenges, OIE worked with members of the IT and Registrar's Offices to create a series of reports that led to a predictive analysis of what students had already taken and what they would need to take in the future. Using these models, OAA was able to regulate the number of course sections and the student enrollment caps in each of the new REACH curriculum areas throughout the transition. Armed with this data, the academic administration moved forward with adjusting student graduation requirements to reflect the requirements of the new core.

Recognizing that the effective use assessment data in decision-making is predicated on the sharing of assessment results with appropriate constituents, the university utilizes a number of platforms to disseminate assessment outcomes. For example, the university shares information about key indicators, including retention and graduation rates, on the Mercyhurst website. (S5.C3: Key Indicators Websites) Similarly, program learning outcomes are posted on the departmental websites as well as in the Course Catalogs. Another example of external communication is the use of external advisory boards. Several programs/departments maintain advisory boards comprised of relevant internal and external stakeholders, such as community leaders of the program's discipline. Reports are disseminated to update board members on student achievement during annual or bi-annual meetings, conveying on-going assessment of student achievement. In the pre- and post-licensure nursing programs, for example, information such as program completion rates, licensure exam pass rates, job placement rates for graduates are shared annually at these meetings. (S5.C3 Nursing Advisory Board Summary) In addition, several programs maintain external accreditation and therefore share a range of assessment information, based on the specific standards of accreditation. For example, the Respiratory Therapist program is accredited by COARC and disseminates assessment results on the program website. (SV.C3 Respiratory Therapist Program Website) Finally, internal constituents communicate assessment results through various formal processes including curriculum forms/applications and funding requests, as well as informally in OIE sponsored faculty development events.

Key Findings

- Since 2014, the university has made steady progress in effectuating a culture of assessment in evaluating educational effectiveness. University departments in both the academic and student support areas demonstrate the development and implementation of goals and outcomes, and the use of assessment data to inform decision-making is increasingly evident, particularly in academic programming and departments. In addition, from the individual course to the curricular program level, student learning outcomes are tied to discipline goals and university mission and core values goals, ensuring that student learning outcomes provide a substantive anchor to the operationalizing of mission and core values as per the current strategic plan.
- In academic program assessment, the university has developed the five-year department assessment plan as a systematic method for achieving and maintaining continuous improvement in educational offerings. In support of the effectiveness of the five-year plan, the university has redesigned the new program development and existing program changes processes to use assessment data to justify creation of and changes to a program. These practices reflect, moreover, both a commitment to continuous improvement and the flexibility to adjust and evolve as conditions warrant, such as in the changes to assessment reporting made in response to the global pandemic.
- The university has made great strides in ensuring the viability of sustainable assessment practices through the creation of the Office of Institutional Assessment and the leveraging of information technology, particularly the Hub, to support assessment data collection and analysis and to communicate assessment data and use to the university community. Moreover, recognizing that educational effectiveness assessment is an institutional attitude, not an office, the university is increasing evidence of university-wide efforts to support assessment practices, such as the Assessment Institute as part of the annual faculty development days.
- The development of a viable assessment approach to student learning outcomes in mission integration through the university's outREACH initiative demonstrates a critical commitment to student learning at the fundamental levels of university mission and Mercy heritage.
- Mercyhurst University has brought more aspects of the total student experience under the educational assessment umbrella through inclusion of assessment of the outREACH programs as well as through changes in the use of library resources, cease enrollment, career development, and alumni tracking processes.

Opportunities for Innovation and Improvement:

1. It is recommended that the university develop processes for evaluating the efficacy of existing assessment processes and implement regular review of institutional assessment strategies.
2. It is recommended that the university continue efforts to operationalize assessment processes across the spectrum of academic, student support, and administrative units, increase transparency and communication as to the processes for and links between assessment outcomes and resource allocation, particularly in university budgeting processes, and provide the additional human and capital resources required to support educational effectiveness assessment.

Chapter 8: Standard VI – Planning Resources, and Institutional Improvement

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

Overview (in process)

Mercyhurst University meets the requirements of Standard VI. A full description of the ways Mercyhurst University meets the nine criteria and all applicable sub-criteria of Standard VI, as well as the Requirements of Affiliation 5, 10 and 11, are presented throughout this chapter.

Finite resources competed over by any number of units is the very definition of the small-endowed, tuition driven institution. In 2016, with a new administration, Mercyhurst University began the demanding task of refocusing planning and budgeting on mission-driven priorities. Part of that refocusing project included a strategic plan that centralized the Mercy mission. The university slowly, because it could not make the turn quickly, shifted back the physical operations, as well the spirit of the institution, toward the renewal of the mission of the founders, the Sisters of Mercy. It did so by returning to the principle of stewardship of its finances. The resources of the university belong not to individual units or departments. "This is student money," is something that can be heard regularly. In that spirit, the university has committed to prioritizing the allocation of resources that serve our mission to educate students and help them succeed. As part of the 2018-20 strategic plan, emphasis in resource allocation was given to enhancing the student experience on campus. The ability to achieve the goal to educate students and help them succeed is supported at the university by the implementation of evidence-based decision making which followed the commitments made in the strategic plan.

Grounding Planning in Mission and Strategic Priorities

Institutional and Departmental Objectives

Objectives, both institution-wide and for individual departments, are clearly stated and directly linked to the university's mission and goals. The university's mission, vision, and core values are found in a dedicated section on the university Hub. (S6.C1: Mission Hub Site) The CHME "Mission Accountability Self-Study and Peer Review" document provides a substantive peer review attesting to how "the vision, mission and Core Values have proven to be very effective engines for the institution." (S6.C1: CMHE 2020 Final Report)

Institutional objectives as articulated through the university strategic plan are available on the university website and through the Hub. (S6.C1: 2021-2024 Strategic Plan) As described in Chapter 3: Standard I – Mission and Goals, the current university Strategic Plan, "Mission-Inspired, Future Ready," explicitly links institutional priorities with the values represented in the university mission and core values. The institutional objectives within that strategic plan were determined based on a variety of assessment data. For example, the President's Cabinet held a Strategy Retreat heading into the planning process for the 2021-2024 Strategic Plan in which they reviewed industry, market, enrollment, and financial data to inform decision making and planning. These data, along with other sources, such as trends in higher-education and comparisons to aspirant and competitive institutions. Focus groups with stakeholders also served as a foundation for the objectives of the current strategic plan, such as Goal 2, which focuses, in part, on student wellness. This objective was born out of

concerns expressed by students during focus group sessions and corroborated by national trends indicating that students are likely to need enhanced supports in the coming years. The Strategic Planning process establishes specific outcomes and progress benchmarks along a range of institutional priorities that are regularly reviewed by the president's cabinet. While an articulated framework for review of the university strategic plan is needed to standardize the process and ensure consistent, on-going review of institutional priorities in real time, the guiding role of the strategic plan at the departmental and unit level demonstrates that the university knows where it wants to go and articulates that vision clearly through its explicit institutional priorities.

Planning and Improvement Processes

Since the last MSCHE self-study, the university has made great progress in using objectives at the institutional and unit level and developing around those objectives substantive planning and assessment designed to achieve accurate and useful information to support continuous improvement. Through the Self-Study process, it was realized that an overarching articulation of planning principles had not been formalized, though certain principles were used by members of the Cabinet in all resource allocation conversations. As such, and concurrent with the arrival of Dr. Getz as the 13th as President, an August 2021 Cabinet Retreat was planned to create a set of guiding principles for all university planning decisions.

Examples of how short- and longer-term planning have been engaged across various areas at the institution follow:

- The Institutional Effectiveness team worked with OAA and individual deans and department chairs to create a set of Needs Reports for academic departments. These reports allow real-time tracking of student completion of their major requirements and allow departments to plan course offerings.
- Human Resources has instituted a university-wide process for sharing data between HR and Finance regarding personnel departures to ensure short and long-term budget tracking.
- Following the hire of a new Athletic Director, the athletics department proposed expanding JV teams to provide significantly more opportunities to recruit new students. In determining which teams to bring online, athletics looked at trends across the country for adding affordable enrollment opportunities and identified several strategies to fit the Mercyhurst student market. This research led to three-year phased implementation encompassing additional club sports as well as the consolidation of previous teams at the North East campus.

In addition to planning and improvement processes across campus-wide units, the systems in place not only allow for but also encourage input from stakeholders at all levels. For example, students often share ideas for improvement, particularly through the Recognized Student Clubs and Organization (RSCO) structure, where a recent example is the promotion and adoption of the Presence platform which allows for student participation tracking at Campus Involvement events. As another example, the Director of IT Client Services & Academic Technology, who oversees classroom technology, utilized data to inform critical technology resource decision-making. As part of area planning, the director evaluated podium technology-based factors, such as classroom usage, classroom type (general vs department specific), number of support calls, and age of equipment, and analyzed the impact of technology assets coming to the Erie campus as a result of the campus consolidation, to recommend plan for technology resource deployment that was presented to the area vice president for approval.

Securing Effective Budget and Resource Allocation Processes

Mercyhurst University has processes for planning and resource allocation that are aligned with the mission and goals of the institution, grounded in evidenced-based decision-making, and that serve to advance the university's goals and objectives.

The Budget Planning Process

To support the process of linking funding to strategic priorities more closely, in 2018, the university engaged a consultant to review and evaluate the then-existing budgeting process in support of goal 3 of the plan, "Renew the university's resources, processes and infrastructure." The report indicated that budget planning information and instructional materials were articulated and informative and that the university software serving in support of the Budget Proposal System was well designed and provided a broad platform for good budget development and subsequent financial control. However, the report indicated that the budget development and post-budget support processes were deficient in terms of a well-defined process and administrative oversight. (S6.C3: External Review) As a result, university administration implemented changes to address the process of budget creation and management as well as to begin to address weaknesses assessment processes. Revisions focused on ways to increase internal satisfaction and effectiveness of the process, foster transparency, increase morale, and clarify roles and responsibilities as they related to budget development and management.

For example, one of the first changes made was the creation of a budget development and management team, known as the Budget Team, comprised of individuals with the credentials, experience, and specialized skills required to assist the university president in clarifying assumptions in the construction of the university budget. The budget team provides budget directors with monthly real-time information and submits quarterly budget projections to the board of trustees. Another change established a systematic approach to budget development. The annual budget planning process begins with the production of that fiscal year's budget assumptions created by the president with the assistance of the budget team. Budget assumptions include, for example, enrollment projections, health care cost increases, existing contract increases, and debt servicing. In addition, either the board of trustees or the president may introduce other assumptions, such as mandatory surplus amounts, increases in the endowment fund, increases in funding to reduce debt service or deferred maintenance. (S6.C3: 2022 Budget Guide)

The Annual Budget Planning Timeline begins in October and outlines various activities, responsibilities, deadlines, and deliverables associated with the development and approval of the Annual Budget. To support participation and transparency, designated forms require departments to complete separate requests for funding increases to Existing Contractual Commitments, New Funding Requests (including Recurring and Non-Recurring Expenditures), Capital, and Intra Year Funding Requests to request funds from the operating contingency. Each of these forms requires the department to provide a summary of the funding request, the total required, the amount currently budgeted or contributed by the department, and the amount requested. The forms further require an explanation of the anticipated outcome and/or return on investment of the amount requested, how the expenditure supports the university's mission and strategic plan, and whether revenues are enhanced or expenses reduced. (S6.C3: Additional Funding Forms) The budget director, dean (if appropriate), and area vice president are required to sign the forms. The Intra Year Funding Request Form to Use the Operating Contingency also requires the budget team to identify how much of the operating

contingency is available and whether there are any pending requests for the use of the contingency. A review of the 2020 budgeting process reveals that, while levels of completion are not consistent, the forms are in use. While most submitted forms contained adequate explanations for the expense justifications, explanations for the tie to mission and the strategic plan were not clearly stated in all cases. Of the requests approved for full funding, several were required by regulatory agencies (utility increases and taxes, for example), or by contractual requirement.

Once the president and cabinet have reviewed and approved budget requests, the budget team works to finalize the annual operating budget. The annual operating budget is forwarded to the Budget and Finance subcommittee of the board of trustees for its review and approval, after which the budget is forwarded to the board of trustees for final approval. The annual operating budget for FY 2022, for example, was approved by the Board of Trustees at its May 2021 meeting.

The Auditing Process

An annual audit and resulting financial statements are required by a variety of federal, state, and local governmental and regulatory agencies, bondholders, granting agencies, banks and investment firms, donors, the university's board of trustees, and other constituencies. The Audit subcommittee of the board of trustees is responsible for the appointment, compensation, retention, oversight, and approval of services provided by an independent accounting firm. (S6.C7: Mercyhurst University Trustee Charters) Among those services is the conduct of an annual financial statement audit. At its spring meeting, the Audit subcommittee reviews the independent auditor's plan for the annual financial audit and required report deliverables. During its fall meeting, the committee reviews the results of the annual financial audit of the university's Financial Statements and any other attestation services provided. This includes the Audit Committee Letter which addresses required communication by the independent auditor and written communications on accounting, auditing, or operational matters (Management Letter), as well as management's corrective action plans, if applicable. Annual independent audits and financial statements issued with an unmodified audit opinion confirm the university's financial viability. Written or oral follow up on the status of management's corrective action plans to the Management Letter are provided to the Audit committee on an as needed basis. The Audit committee reviews a Comparative Financial Ratio Report prepared by the independent accounting firm when the report is available. (S6.C7: BOT Audit Subcommittee Minutes 10-2021)

The annual financial statements are used by university staff, primarily in the Finance Office, to complete compliance requirements, prepare analyses and projections, and respond to a myriad of financial information requests such as annual insurance renewal forms and grant applications. The Financial Statements are also used by the external audit firm to prepare a Comparative Financial Ratio Report wherein key financial ratios are calculated using the Mercyhurst financial statements. Comparisons for several years are made against industry medians as well as the ratios of a select group of private four-year colleges and universities with which Mercyhurst competes for undergraduate admissions. This Comparative Financial Ratio Report is reviewed annually by the Audit committee of the board of trustees. Further particular use by the university of the independent audit is the Management Letter. Because the Management Letter categorizes deficiencies in internal control into three categories: material weaknesses, the most serious deficiency, where there is a reasonable possibility that a material misstatement of the financial statements will not be prevented, or detected and corrected on a timely basis; a significant deficiency, a deficiency that is less severe than a material

weakness, yet important enough to merit attention by those charged with governance; and a control deficiency, the least severe of the three types of deficiencies, and can include control objectives that are either missing or are not properly designed to meet the control objective. Management provides responses, and if applicable, corrective action plans for each of the identified deficiencies. The Management Letter serves as one mechanism to ensure continuous improvement in the university's internal control system, which is primarily the responsibility of the Finance Office. (S6.C7: Audited Financial Statements, S6.C7: 2021 Management Letters, S6.C7: Comparative Financial Ratio Reports)

Auditing processes are conducted on campus at the close of each fiscal year. Notably, while COVID-19 forced the independent annual audit to be performed 100% remotely for fiscal year 2020, the annual audit and Financial Statements were completed within the required deadlines to be presented to the Audit committee of the Board of Trustees at its Fall 2020 meeting and meet the required annual compliance filing deadlines. Despite the many challenges posed by the global pandemic, the independent audit firm did not find any deficiencies that would require the issuance of a Management Letter for fiscal year 2020. Will update at 2021 audit completion.

Stewarding Sustainable Planning for Institutional Resources and Infrastructure

Human Resources

The Human Resources Department (HR) is the nerve center of the university's commitment to reflecting mission values in employee practices. The HR department is managed by a director and staff, under the supervision of the university's vice president for legal affairs and general counsel, who also oversees the critical function of minimizing risk for the university. As detailed through its Hub site, the HR department's mission commits to supporting "the university's mission to recognize the dignity of work and the importance of service to others." Operating from the principle that policies and procedures are beneficial when applied equitably and communicated widely, human resource policies and procedures are structured to reduce confusion, foster communication, and provide essential information for the HR department's core function of serving employees and the university in keeping with the academic mission of the university. The key question of HR is, "How can we best assist all Mercyhurst employees as they attempt to carry out duties in order to achieve the Mission?"

As shown on the HR Hub site, starting in 2018, the HR department conducted focused planning and assessment processes, which resulted not only in an HR assessment plan with mission and goals through 2025, but also in numerous new department processes and procedures, including, for example, the process for new employee orientation and targeted efforts to control health insurance costs. (S6.C4: Assessment Plan for Human Resources, S6.C4: 2018 Focused Assessment Results for Human Resources) As another example, the HR department played a central role in the university's transition to its current insurance partner. As a self-insured institution, the university works with a broker to secure services in the insurance market. Because the university is self-insured, it is very attentive to cost of claims as significant increases in claims costs will negatively impact the rates employees must pay. Throughout 2018 and 2019, two insurance carriers affiliated with the two primary hospitals in Erie used by university employees were engaged in a public dispute over whether they would continue accepting each other's insurance at their health care facilities. Mercyhurst had used Highmark Insurance for many years leading up to this conflict and while happy with their services and coverage, the university was extremely concerned about the prospect of having an insurance product that could not be used at one of the main health care providers in town, namely UPMC. The primary concern the university had was the

potential lack of provider choice for employees. After consideration and discussion by board of trustees and administration, decision was made to shop the insurance to try to balance cost and employee choice. Because both UPMC and Highmark were unable to confirm that university employees would be able to use either hospital in town (UPMC Hamot/UPMC Insurance and St. Vincent's/Allegheny Health Network/Highmark), and because anticipated claims cost came in at a competitive number, the university selected AETNA to be its insurance carrier for FY 2019/2020. (SEE Insurance Comparison Matrix which was presented to the BOT – this document contains confidential information that should be redacted if we are going to share with MSCHE). There was no change or increase in employee premiums with this change and the projected claims figures proved competitive based upon assessment at the close of FY 2019/2020. Most importantly, the selection of AETNA allowed the university to retain employee choice of health care providers. (S6.C4: Insurance Summary 2019-20, S6.C4: Change of Insurance Overview)

Through the Personnel Action Form (PAF), the HR department works with area vice presidents to ensure that enough competent faculty and staff are available to meet student or other institutional needs. Available on the HR Hub site, the PAF form is used for all requests and changes to employment, such as hiring new employees, stipend requests, salary changes, employee change in status, changes to general ledger accounts from which employees are paid, as well as employee terminations. As the trigger for employment actions and system updates for employee position and status changes, the PAF drives the approvals that are entered into the Colleague system for position or wage changes to an employee record. If a position is vacated and the intention to fill that opening is indicated, the position and salary level must be submitted on a Personnel Requisition Form (PRF) before posted as an open position and available for hiring. (S6.C4: Hiring Process)

The Human Resources department conducts Exit Interviews of all employees leaving the university to collect and assess reasons for departure, ensure collection of university property and equipment, and address any benefits transition issues. Occasionally, the information gleaned in the exit interview may lead the HR Director to contact the vice president, supervisor, or department representatives about concerns raised in the exit interview, for example, salary concerns, staffing issues, or environmental/personal issues. (SEE Exit interview question docs and spreadsheet in Merry's Folder).

Information Technology

Effective stewardship of resources and sustainable planning is also grounded in the coordination between The IT department offers extensive flexibility and supports many platforms required for effective administration and teaching at the university. (S6.C4: List of IT-supported Platforms) To serve its constituents, the IT Department offers The IT Roadshow, which enables departments or individual employees to request a consultation with IT staff on IT on any number of technology issues, such as solving technical problems or focused training. For example, the HR department scheduled a session in the Fall of 2019 to learn how to increase efficiencies through technology, such as synching individual calendars and creating an interactive department calendar. The HR team also used this time to visualize how the new department OneDrive would be accessible. (S6.C4: IT Roadshow Example) As another example, in support of the campus-wide transition to remote learning in March of 2020, IT staff focused on the shift to virtual learning for students, synchronous instruction for faculty, as well as increased migration to remote work for staff and administrative employees. IT staff offered instruction to all employees on, for example, how to transfer office phone lines to personal cell phones and use virtual

meeting platforms, such as Teams, to continue the essential work of educating, recruiting, and supporting students. Through such Initiatives, both the HR and IT departments support the strategic plan by improving efficiencies and supporting employees in their efforts to be better stewards of the university's mission and core values.

In all areas of the university, the role of technology has vastly expanded since 2015. The principle behind technology innovations at the university, while always an important aspect of fulfilling the university's mission and goals, has been to strengthen technological infrastructure to support operations and the delivery of programs. For example, to increase digital security, Mercyhurst has implemented a Multi Factor Authentication (MFA) procedure for logging into the university system. MFA is a two-step verification process that offers significant challenge to anyone attempting attack. It prevents people from logging in under another person's credentials and provides high security for all proprietary and personal information housed in the university databases. (S6.C4: Multifactor Authentication Policy) In addition, the maintenance of technological infrastructure is accomplished, in part, through the IT Ticket System located on the university's IT and as a quick link on both the Employee and Student Hub pages. IT Ticket System was implemented to trouble-shoot issues with various IT systems: email, the Colleague system, equipment problems, as well as Colleague access inquiries. Once submitted, a receipt is emailed and a member from the designated IT area reaches out regarding the ticket request. Once it has been resolved, notification that the ticket is closed is also emailed to the employee. (S6.C4 IT Ticket System Overview)

Finally, the use of technology in academics, human resources, finance, enrollment, marketing, and student life allows directors and vice presidents to make accurate, data-driven decisions in real time. Another example of the improvements to infrastructure through information technology occurred as the university met the demands of responding to the global pandemic. Student Life and Academic Affairs needed to track the status of a student in quarantine or isolation in real time. In collaboration with IT, an existing program used to track enrollment was adapted to produce a case management system that interfaced with the main administrative system to, for example, generate emails to the office of Student Services for sending remote study notifications to the affected student's faculty members or provide real-time data as to where and for how long a student would be in quarantine or isolation to all need-to-know departments, including academics, athletics, maintenance, and food services.

Physical Infrastructure

Among the four goals identified in the 2018 "Renewal Through the Mercy Mission" strategic plan were two key goals relating to infrastructure: Goal 2, to "Renew Our Campus Culture"; and Goal 3, to "Renew the University's Resources, Processes, and Infrastructure." Several items outlined in the second goal include the creation of a sophomore residence hall on the Erie Campus, as well as investing in the improvement of athletic facilities for student-athletes. (S6.C4: 2018-2021 Strategic Plan) Each of these two goals were implemented within the university's financial planning processes. In Fall 2018, the university utilized bond financing to construct Ryan Hall, sophomore residence facility. (S6.C4: Ryan Hall Needs Analysis) In 2018, the university also launched a \$9.5 million capital campaign for Athletics; the Laker for Life Campaign for Athletics renovated the two existing outdoor athletic fields and completely renovated the Mercyhurst Ice Center to include a locker room expansion. In addition, the campaign funded the creation of a third outdoor field just south of the existing fields, which was

completed in August 2021 after being delayed because of the pandemic. (S6.C4: Laker for Life Campaign Summary)

A similar system harnessing technology is in place to maintain the physical plant of the university. The Maintenance Ticket System is also located as a quick link on the main Employee and Student Hub pages. This system was implemented to request any maintenance related work: Electrical, Heating/Cooling, Plumbing, and Building maintenance, such as door repairs, ceiling tiles, or lights. Requests for custodial services and notifications about landscape or grounds can also be processed through this system. Ticketing begins with the employee or student submitting contact information, along with a description of the requested work. A confirmation email is sent, and a staff member from the appropriate maintenance team reaches out for further details, at which point a date and time is established for performing the requested work. (S6.C4: Maintenance Ticket System Overview)

The goal of renewing university resources, processes, and infrastructure has been addressed in a number of areas. For example, the goal calls for the development of a deferred and preventative maintenance plan. In a report presented to the board of trustees in February 2020, the chair of the strategic planning process noted that from the list of projects identified on the deferred and preventative maintenance plan, 29 had been completed. These actions included remodeling projects, renovations, and new construction efforts aimed at reducing deferred maintenance needs in university academic, athletic, and residential spaces. (S6.C6: Deferred Maintenance Report 02-2020) A second key initiative of goal 3 was to improve university-wide efficiencies, with a particular focus on processes and data accessibility. Within this goal there were 55 completed projects that have substantially improved operational efficiencies and data accessibility across the university. (S6.C6: University Processes Efficiency Updates Summary) In addition, there has been a renewed focus on employee training opportunities in both group and individual settings as additional technologies are brought online. As new technologies and practices are being implemented, there are corresponding procedural and policy guidelines established. This helps ensure data accuracy and consistency and that proper security controls are in place from the launch of these technologies.

Engaging Resource and Planning Toward Institutional Improvement

Decision-making and Accountability

The strategies summarized above require a stable financial environment to be successful. As part of ensuring that stability, the university employs systematic processes to connect funding requests within university budgets to mission, strategic priorities, and data. For example, budget management policies and procedures forms are used to request additional funding for capital and specific projects and to guide budget directors in budget entry and reallocations to reflect more accurately actual expenditures. In this way, the budgeting process provides a system of accountability for budget directors and provides measures to assess the adequacy and efficiency of institutional resources. In the case of requests for new or additional funding in the operating budgets, the university employs forms that may be used during the budget development process to modify current funding levels within individual cost centers. The forms address specific types of requests for additional funding: increases in existing contracts; new funding within the operating budget (one-time and recurring); and new funding for alternations and/or improvements to existing facilities. Each of these budget modification request forms requires detailed information in support of the funding, including the objectives of the additional funding being

requested and evidence that the funding is necessary, as well as articulated links to the mission and/or goals of the university and department's strategic plans and an action plan for how the value of that contribution will be measured at the end of the funding period. And finally, requesters are required to document impacts of the additional funds, including those on students, faculty, staff, and administration, the teaching and learning environment, and operational improvements. (S6.C5: Budget Process Roles and Responsibilities, S6.C5: Budget Request Forms)

Assessing Effectiveness

The university utilizes a range of required compliance activities that satisfy a variety of regulatory requirements to assess its fiscal and physical resources, such as the Continuing Disclosure of Bond Compliance, FISAP and IPEDS reports, Indirect Cost Rate, and S&P Bond Rating Reports, fundraising reports, and the Annual Cash Graph. In addition, the university prepares a range of financial reports that assist in the management of its resources, as well as providing information as required by certain entities.

In the finance area, the university draws on a variety of sources to monitor outlook and inform decision-makers. For example, the Finance Office maintains the university's S&P Bond Rating Report, which is an annual review by Standard and Poor's (S&P) at the completion of their annual review of the university. The most recent S&P Bond Rating Report (the Report) for the university is dated January 30, 2020. In that report, S&P rated the university's long-term bond rating BB with a Stable Outlook, based upon the university's intention to issue additional bonds associated with the consolidation of its North East Campus. The Report expresses S&P's opinion about the university's financial health based on several factors, including overall industry risk, market position and demand, management and governance, financial profile and available financial resources, and long-term debt. Lower bond ratings can negatively impact the overall cost of a bond issue to an institution, particularly if the issue has a variable interest rate or interest rate swap. The university's current debt portfolio includes only fixed interest rate issues, which are less price sensitive to ratings changes. Other considerations in financial decision-making include the university's bond issues, which outline disclosures that are required to be made to remain in compliance with the legal documents and covenants that comprise the bond documents. These requirements are outlined in a Continuing Disclosure Agreement for each bond issue. The purpose of the agreement is to keep the bondholders apprised of the university's finances and other key information and operational data through an Annual Filing, as well as to notify bondholders of specific events impacting the bonds, such as bond rating changes. In addition, the Annual Filing contains the Audited Financial Statements, along with an appendix of historical data on the university's history, governance, accreditation, principal officers, facilities, academic programs, enrollment, applications and acceptances, student quality, student housing, student fees, and competition. The Annual Filing provides an assessment of the effectiveness of the university's planning, resource allocation, and availability of resources at the institutional level.

A summary of other activities used for the purposes of measuring the adequacy of institutional resources and the efficiency of their use is found in the table below.

Table 5 Sample Financial Adequacy Measures

Assessment tool/strategy	Information Prepared by	Stakeholder/user	Intended use	Example of Use
Fiscal Operations and Application to Participate Report (FISAP)	produced annually, jointly by the Office of Student Financial Services and the Finance Office	Department of Education for Campus Based Aid Programs such as Federal Supplemental Education Opportunity Grant (FSEOG) and the Federal Work Study (FWS)	one factor in assessing the amounts to award an institution for each program in future years	
Integrated Postsecondary Education Data System Report (IPEDS)	Produced annually by Institutional Research	Federal government, with past data widely available to all end-users	<ul style="list-style-type: none"> provides context for understanding the resources and costs of providing postsecondary education compare to similar institutions analyze where institutions' revenues are generated and where expenses are incurred 	<ul style="list-style-type: none">
A Comparative Cash Graph. The rate is. The Indirect Cost Rate effectively allocates the institution's administrative costs in a fair and objective manner from grants and contracts. It is used by the.	maintained by the Finance Office	University administration, board of trustees	<ul style="list-style-type: none"> monitor the adequacy of current cash reserves and project the need to use either long-term investments, or the line of credit, to supplement operating cash during the summer months when cash is typically at its lowest point during the fiscal year useful in showing trends and the availability of cash resources over several fiscal years 	<ul style="list-style-type: none">
The Indirect Cost Rate proposal	Calculated by the Finance office every three years; approved by a federal funding agency, in order to charge grants/contracts with their fair share of indirect expense	Finance Office, Grants office, individuals applying for external funding	provides the ratio between the university's administrative expenses, also referred to as indirect expenses, and its educational and grant/contract related expenses, also referred to as direct expenses	
Advancement receives periodic budgetary adjustments based upon performance needs that	Advancement Office	Advancement Office, President and Cabinet, Board of Trustees	<ul style="list-style-type: none"> recap overall fundraising activity that may not be 	In June 2018, for example, the Advancement Office was able to fund a Director of Annual

<p>include operational and staffing resources.</p>			<p>focused on a goal or objective</p> <ul style="list-style-type: none"> • evaluate performance and provide metrics for budget planning purposes • year-to-year comparison of performance 	<p>Giving hire to bolster efforts toward achieving a \$750,000 goal for the Mercyhurst Annual Fund for fiscal year 2019. The additional personnel resource increased time invested in donor interactions via direct mail, email, and telephone. Total giving for the Mercyhurst Annual Fund increased by 33.6% from fiscal year 2018 to fiscal year 2019, resulting in the data-based decision in 2020 to make the position permanent.</p>
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Key Findings

- Grounding planning processes in clearly articulated mission links, university administration acts as stewards of the finite resources. Since 2018, in fulfillment of the university strategic plan, the administration has significantly increased the allocation of resources to enhance mission-resonant academic and co-curricular student experience, especially in technology.
- With mission so prominently featured in the two most recent strategic plans, the university has made significant progress in determining what of the many possibilities will become capital projects. Similarly, the university's planning with regard to deferred maintenance and debt service shows progress toward bringing all aspects of university finances to bear in supporting mission and core values.

Opportunities for Innovation and Improvement

1. It is recommended that the university continue to develop explicit and transparent means for linking the university budgeting process to mission and strategic priorities and for communicating those processes to university constituencies.
2. It is recommended that the university continue efforts to address deferred maintenance and debt service and to ensure the financial sustainability of a small-endowed, tuition-driven private university in a complex and competitive higher education market.

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Chapter 9: Standard VII – Governance, Leadership, and Administration

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

Overview

Mercyhurst University meets the requirements of Standard VII. A full description of the ways Mercyhurst University meets the five criteria and all applicable sub-criteria of Standard VII, as well as the Requirements of Affiliation 7, 12, 13 and 14 are presented throughout this chapter.

A governing body which guides the implementation of the Mercyhurst University's mission, vision, and core values and takes seriously its fiduciary responsibility through effective strategic planning is vital to the success of a university. Mercyhurst University recognizes the important elements of a well-defined system of governance, the value of a visionary and strategic leader, and the critical importance of administrative organization and composition in service of the mission. The governance structure and administrative leadership of the university ensures that the mission is the inspiration which underpins the execution and planning of the academic enterprises. Further, recognizing the importance of effective leadership, the university regularly evaluates the performance of the university president and the senior administrative team.

Mercyhurst University operates within a shared governance model that identifies the governing bodies of the institution with each constituency. The governing body, referred to in this self-study as the board of trustees, operates under a clearly defined set of bylaws that articulate the respective roles and responsibilities of the full board and its subcommittees. Other critical constituencies in the shared governance model also function under articulated bylaws, including the University Council, Faculty Senate, Staff Senate, and Mercyhurst Student Government (MSG).

Governing the Institution: The Board of Trustees

Through the Mercyhurst University Board of Trustees, the university maintains a legally constituted governing

The board of trustees adheres to the principles of good practice as outlined by the Association of Governing Boards and ensures that the governing board or its members do not interfere with day-to-day operations at the institution. (S7.C2: Association of Governing Boards Principles of Good Practice) All members of the board of trustees receive a copy of the "Trustee Responsibilities" document at the beginning of each academic year. As evidenced by the minutes of its governance subcommittee, the board of trustees reviews and updates the Mercyhurst University Bylaws as needed and consults the bylaws as part of its regular operations. The university bylaws include specific ethical standards in university governance. For example, the conflict-of-interest policy (Article VI) addresses

potential conflicts of interest and prohibits political, financial, or other influences to interfere with governing responsibilities and requires that potential conflicts of interest be disclosed through the Conflict of Interest Disclosure form at the beginning of each academic year. (S7.C2: BOT Conflict of Interest Disclosure)

academic affairs is charged with overseeing the academic function of the university, including degree programs and recommendations for faculty tenure and promotion. The subcommittee on compensation reviews and approves changes to personnel policies, such as retirement plan policies. (S7.C2: Mercyhurst University Trustee Charters)

As detailed in Chapter 3, the board of trustees is deeply committed to the university mission and to ensuring that the university fulfill that mission. Through focused efforts, such as review of the mission and core values conducted by the board's Subcommittee on Mission in February 2021 or through active engagement with the Conference on Mercy Higher Education (CMHE), including a successful visit and review in 2020, the board of trustees keeps mission and Mercy at the center of university strategic development. Through its subcommittees and as a full governing body, the board of trustees provides responsible leadership in ensuring that the university fulfills its mission and goals in the context of sound fiscal management and a commitment to academic excellence. (S7.C2: CMHE 2020 Self-Study)

Recognizing the critical importance of sound financial management to every other aspect of the university operations, the board of trustees demonstrates stewardship of university resources at both the macro level, specifically oversight and approval of the university financial operations, and at more granular levels which affect the welfare of employees. For example, the board of trustees has three committees dedicated to policymaking in financial matters to ensure strong financial health of the institution. The budget and finance, audit, and endowment and investments subcommittees share oversight of the university's financial management with each committee's responsibilities identified within its individual charter. Also, as detailed in Chapter 8,

would maintain access to both healthcare systems while holding down costs. (S7.C2: BOT Summary of Financial

Like many private religiously affiliated colleges and universities of its size, Mercyhurst University is largely tuition and room and board dependent, and a smaller than average endowment does not provide resources for operational deficits. Cognizant of these factors, the board of trustees prioritizes sound financial management to maintain economic stability and a positive relationship with lenders. A stated financial goal of the board of trustees in the strategic plan is to reduce gradually the difference between the published tuition cost and the net tuition revenue. In addition, the board of trustees and the university administration have worked together to increase significantly fundraising, which has permitted the university to pursue important facilities project, such as upgrading athletic facilities, including the Vorsheck Athletic Complex and Saxon Field. (S7.C2: Board of Trustees Fundraising Summary)



Providing Strategic Leadership: University President and the President's Cabinet

trustees assembled a Presidential Search Committee. As documented in the February 2021 minutes of the board of trustees, when President Victor retired earlier than expected in February 2021, then chair of the board of trustees and Mercyhurst alumnus, Joseph NeCastro, temporarily stepped down from his trustee role to assume the role of Interim President of Mercyhurst University. On May 11, 2021, the board of trustees announced the appointment of the university's 13th president, Dr. Kathleen Getz, whose tenure as president began in July 2021. (S7.C3: Presidential Profile for Dr. Getz)

In appointing the university president, the board of trustees has demonstrated a clear focus on ensuring both the knowledge and experience required to lead a complex organization and the capacity to espouse and represent the university mission, core values, and Mercy tradition. For example, as documented in its June 20, 2015 minutes, in appointing Michael T. Victor on May 15, 2015, the board sought to ensure that the university would be provided experienced, qualified senior leadership. Having previously served as dean of Mercyhurst's Walker School of Business, Michael Victor was the sitting president of Lake Erie College in Painesville, OH. In addition to his corporate leadership experiences, President Victor's curriculum vitae demonstrated a lifetime of learning, leadership, and civic engagement, as well as substantial experience working on and with corporate and universities boards. (S7.C3: Presidential Profile for Mr. Victor) In appointing President Kathleen Getz in May 2021, the board ensured not only experienced and qualified executive leadership through Dr. Getz's over two decades of senior academic management at both Loyola Chicago and Loyola Maryland, but also a profound commitment to values and the Catholic Liberal Arts tradition via Dr. Getz's experience in service within the Catholic university setting and in the larger community.

As shown on the university's organizational chart, the President's Cabinet consists of eight area/division vice presidents, each charged with oversight in a designated area, including academic affairs, led the vice president for academic affairs, mission, enrollment, student life, finance and administration, legal affairs, information/technology, and advancement. (S7.C3: President's Cabinet Organizational Chart) The profiles of the area vice presidents demonstrate not only qualified and experienced leadership but also strong commitment to both the mission and Mercy heritage of Mercyhurst University. (S7.C4: Cabinet Profiles) In addition to defining the key administrative designations of the president's cabinet, the organizational chart outlines the departments within those areas with direct reporting lines to the area vice presidents, which include a skilled set of deans, associate deans, associate vice presidents, and department chairs. The area vice presidents oversee departments appropriate to their assigned administrative area and are responsible for ensuring high standards of professionalism, effective communication, and best practices.

Operationalizing the Strategic Plan: University Administration

Essential to the success of any university are administrators with institutional knowledge and an understanding of operations ranging from the frontlines of service to board room policy development. The governing body ensures that the university administration is replete with capable employees reporting to highly qualified administrators, many of whom, through initiative and talent, have moved to higher-level roles from entry-level positions. The university organizational chart clearly defines each administrative unit and the reporting structure to the area vice president. (S7.C4: University Organizational Chart) Within the academic units, a dean oversees the operations of each college. (S7.C4: Academic Dean Profiles) Ultimately, it is the responsibility of the area vice

presidents to ensure that administrators have the necessary credentials and experience consistent with the mission to ensure the efficient and effective operation of the university.

Annual performance reviews conducted through the Office of Human Resources are designed to enable professional development through formative goals and to ensure consistent quality review. While the university has struggled to bring all administrative and staff offices into the process, a situation further complicated in spring 2020 when nearly all university operations went remote, the performance review process in spring 2021 engaged all administrative departments, with program directors working with staff in their areas and the respective vice presidents to ensure a 100% completion rate for administrative performance review submitted to the Office of Human Resources for fiscal year 2021. (S7.C4: Performance Review Process)

Modeling Shared Governance

The governing body is committed to a shared governance model which encourages and provides opportunities for frequent and effective communication and collaboration between university constituencies. Through this commitment, the governing body is guided in its actions by a constituency-based governance model that enables review and recommendation on a wide range of issues and concerns. Through their various senates and associations, the faculty, staff, students, and alumni participate in the life of the university, regularly engaging with administrative leadership, including the president and area vice presidents. Each of these organizations, faculty senate, staff senate, Mercyhurst student government, alumni association, and university council, has its own constitution or bylaws framing both its purviews and pathways for communication with administrative leadership. For example, serving as a node linking the various constituencies and their representative bodies, the University Council is comprised of administration, faculty, staff, and students. (S7.C4: University Council Bylaws) As noted in its bylaws, through regular meetings the university council provides “a setting in which discussion and deliberation will not only reflect the views of all major constituencies but will also aim toward a blending of these views into policy recommendations that embody the concerns and interests of the University as a whole.” Through these constituency-based organizations and their standing committees, the governing body is supported by a clearly articulated and transparent governance structure that draws upon the knowledge and experience of the university’s dedicated, talented, and mission-committed administration, faculty, staff, and students.

Evaluating Effectiveness

Regular assessment and evaluation of the administration is a critical component in support of the continuous

process and schedule for academic administration evaluation by the AEC is maintained through the committee's evaluation schedule. (S7.C5: Faculty Handbook p.X)

COVID-19

During the early stages of the COVID-19 pandemic, the university implemented a robust plan managing all aspects of the university's response. Specifically relating to governance structure and administrative leadership, the university appointed a pandemic officer who was responsible for leading the university's critical incident response team. Under the pandemic officer's direction, a COVID-19 task force was assembled and charged with guiding university policies and initiatives in response to the coronavirus pandemic. The task force included administrators, staff, and faculty from all university constituencies. Prior to the students' return to campus for the fall 2020 semester, the task force held training sessions for all employees to highlight key components of the plan to safely return students back to campus. The task force also oversaw the process recruiting twenty staff members to complete a certificate program to be trained as contact tracers and oversee the tracking and implementation of contact tracing at the university. Recognizing the need for "all hands on deck," the university board of trustees drew upon the example of the Sisters of Mercy in mobilizing an extraordinary level of cooperation and communication between and among leadership and the various constituencies. For example, as evidenced in the minutes of the COVID-19 Task Force, the chair of the board of trustees engaged heavily with the COVID-19 Task Force in during the critical period of taking the university remote in March and Early-April, 2020. Moreover, three special meetings of the executive committee of the board of trustees were convened in April, May and August 2020, to discuss the impacts of and university response to COVID-19. Finally, the full board of trustees engaged in discussion of COVID-19 response and strategy at its June and August, 2020, meetings just prior to the return to campus by students.

During the fall semester 2020, the Mercyhurst University pandemic officer convened a COVID-19 testing committee consisting of administrators, staff and faculty charged with researching and providing recommendations to the administration regarding COVID-19 testing strategies. At the recommendation of the committee, the board of trustees approved a robust COVID-19 testing plan involving pre- and post-arrival testing, surveillance testing among the campus community, regular testing of student-athletes for return to plan as outlined by the National Collegiate Athletic Association (NCAA), and on-demand testing for symptomatic individuals at the university health center. Need to bring this up to summer 2021 at least.

Key Findings

- In the Board of Trustees, the university has a sufficiently sized and scoped governing body that functions in an oversight role to ensure integrity in academic programming and compliance with all accreditors and to exercise its fiduciary responsibility for sustaining the material health of the university. The board of trustees has access to critical academic and financial information required to make informed decisions for the benefit of the university through its subcommittees, which include area vice presidents as liaisons, as well as representatives from faculty, students, and alumni. Further, the governing body interacts with, provides communication pathways for, and elicits feedback from university constituencies as appropriate, such as in the presidential search committee Hub site or healthcare insurance provider survey.

- The governing body demonstrates a clear commitment to ensuring experienced and effective administrative leadership, particularly with regards to the university president. In developing and implementing a systematic approach to the presidential search process, including a national search process conducted by a professional search organization, the board of trustees has acted to ensure that the university is led by a highly credentialed professional with sufficient experience and expertise to lead in the higher education setting. In addition, the board of trustees has engaged in a formal evaluation process of the president in terms of key performance indicators, among them are furthering the mission and core values of the university and has effectively maintained organizational stability and constituency confidence through presidential transitions.
- The president of the university is directly served by eight area vice presidents who are sufficiently credentialed and experienced in their respective domains. Meeting weekly as a group with the president allows vice presidents to interact with each other to ensure that all departments and units are appropriately resourced and supported and that decisions vital to operations are being made in a timely manner and at the level most appropriate to the concern.
- The governing body demonstrates a responsible and respectful interest in constituency concerns through an on-going commitment to and support for the shared governance model. In addition to the formal units or departments, bodies such as the faculty and staff senates, the Mercyhurst student government, and the university council, the governing body functions, through the shared governance model, in the information-rich environment best suited for effective decision-making that supports effective policies or procedures and ensures continuous improvement.

Opportunities for Improvement and Innovation

1. It is recommended that the university consider ways to ensure annual updating of all organizational
- 2.

Chapter X: Key Findings

The Key Findings Chapter, which will serve as the conclusion for this Self-Study Report, will appear here. This will be written after all feedback has been gathered and the document has been updated accordingly and finalized.

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DATA and EVIDENCE

In the new Middle States Self-Study Process, Data and Evidence are shared through the Evidence Inventory – an online collection of materials that is organized according to the MSCHE Standards.

If members of the community wish to ask about specific pieces of evidence or share them for the Self-Study, they should reach out to ie@mercyhurst.edu.

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