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MEADVILLE LOMBARD THEOLOGICAL SCHOOL
Assessing Institutional Quality and Performance

“Quality assessment is an exercise in shared governance.”

Basic questions: Why should students choose to enroll at Meadville Lombard Theological School? Will they receive an educational experience that we say they will receive? What are our legal and ethical responsibilities to deliver quality? What is Meadville Lombard quality?

A Definition: “Quality is conformance to mission specification and goal achievement—within accepted standards of accountability and integrity.” (Bogue & Saunders, The Evidence for Quality.)

Do we deliver what we promise? Is our “promise and deliver” integrated into every course, every degree, every out of class activity?

What difference do we make? Can we ‘change lives to change the world?’

Is our model of shared governance geared to mission specification and goal achievement? Do we really hold the board, the president and the faculty accountable?

Do our multiple stakeholders have a vested interest in institutional quality? How do they hold us accountable? Do we report the Meadville experience with integrity?

What higher education practices do we follow in our search for quality—accreditation, rankings, outcomes assessment, professional licensure, peer reviews, program reviews, and alumni surveys?

Evidence for quality: We have a vested interest in quality control. What evidence can we muster to demonstrate that we are being strategic in this effort?

Can we improve decision making through effective shared governance?

What indicators will we accept as evidence of quality?

What standards of performance will we accept?

Who will access our efforts and judge our quality?

The hope for quality must lead to action; otherwise it is just a fantasy. Our call is to venture into learning and discovery. The structures of shared governance represent a valid starting point.

Board Assessment and Development:

The standards of the Association of Theological Schools include boards among the areas of institutional life targeted for periodic assessment. The standard states:

“The board has the responsibility to hold itself accountable for the overall performance of its duties, and shall evaluate the effectiveness of its own procedures. It should also seek to educate itself about the issues it faces and about

procedures used by effective governing bodies in carrying out their work. The board shall evaluate its members on a regular basis.”

Benefits of board assessment are:

1. Increased board-esteem.
2. Clarification about the board's role.
3. Assurance that the board adds value to the institution.
4. Assessment serves as a learning program.
5. Enhances board's role in shared governance.
6. Opportunity to focus on mission and core values.

Methods of board assessment:

1. First steps: The board chair and the president can prepare a list of the several goals for a meeting and include these on the agenda distributed. End each meeting with a 15 minute discussion of “ideas for improving our board” or, ask board members to jot down ways they believe that a meeting could have been improved. Use the information to shape a learning plan for the board.
2. Schedule the *In Trust* Governance Audit as a mid-level assessment tool. The Audit report identifies gaps in trustee understanding of the school's operation and programs, and serves as the basis for an annual learning plan for the board.
3. Plan for a formal assessment as part of a three-year cycle of board development activities. Pre-packaged survey instruments are available, however, those instruments that are tailored to higher education, especially theological education, (e.g. *In Trust*) are most effective.
4. Schedule a retreat and invite a consultant to lead the board in an assessment of its work, roles and responsibilities. Boards that hold themselves accountable for the overall performance of their duties increase their effectiveness and value to the institution.

Presidential Assessment:

Presidential assessment goes hand-in-glove with board assessment. The board and the president are a team, and the most effective assessments are realized in the context of joint assessment efforts. The board-president relationship is one of dual authority, carried out by board acting on the basis of group consensus and a president acting with personal authority. It is helpful to remember that boards are continuous, the president is temporary; the board serves part time, the president serves full time; the board has final

authority, whereas the president serves at the pleasure of the board on the basis of expertise. This is an exchange relationship and involves mutual reciprocity. The board expects the president to educate them about roles and responsibilities, to keep them informed on issues and challenges, and to lead them with enthusiasm and energy. The president looks to the board for wisdom, advice, ideas, plans and authorizations for governance matters and depends upon the board to support and uphold the leader of the institution.

Some background observations:

1. There are a variety of assessment procedures: formal or informal, yearly or occasional, and written or oral.
2. The purpose of assessment is to share views, exchange ideas, identify areas of strength, correct areas of weakness, and plan for the future by reviewing and resetting institutional goals.
3. There is no evidence that presidential assessments strengthen the leadership role of the president. There are strong indications that presidential assessment in the context of board assessment improves the leadership of an institution.
4. Some scholars argue that formal and public assessment creates problems and reduces the role of the presidency.
5. No one perfect model exists for all institutions, therefore, a board needs to determine the most effective approach for their situation.
6. Informal assessment is a preferred approach for free-standing schools where a high degree of mutual trust and support has developed between the president and the board.

How should assessment be done?

1. Defining assessment by the board is important.
 - a. Assessment: a value judgment based on perceptions of style and substance. Based on anecdotal methods and interpretations.
 - b. Review: Based on an evaluation of the past and examines results.
 - c. Measurement: Based on quantifiable data and is objective, and serves as a basis for establishing goals for the future.
2. Informal Assessment:
 - a. The chair and/or a committee of the board quietly and confidentially share informally collected information with the president.
 - b. Does not involve deliberate attempts to systematically collect information.
 - c. Never involves the use of consultants.

- e. Personal and professional needs should be addressed.
 - f. Serves as a basis for developing future goals and the criteria for the next assessment.
6. A possible procedure based upon an informal assessment on an annual basis.
- a. President and board chair agree upon the criteria to be used for the assessment.
 - b. President writes a self-evaluation and submits it to the chair.
 - c. A committee of the Executive Team meets to review the president's self-evaluation, the criteria, and its evaluation.
 - d. The president and the committee meet with the Executive Team for an informal, private, and confidential conference.
 - e. The outcome of the assessment is shared with the full board.
 - f. The assessment results are not reported public ally.

Faculty Assessment:

A faculty designed system of assessment should cover both professional and personal categories of criteria. Instruments may include student evaluations, peer evaluations, and self-evaluations. Leadership for the faculty assessment program should come from the Provost's office.

Institutional Peer Review:

Peer institutions may be selected for review and comparative purposes. This service is available through the Association of Theological Schools. This allows judgments to be made in reference to certain benchmarks and addresses an institutions progress, trends, or status.

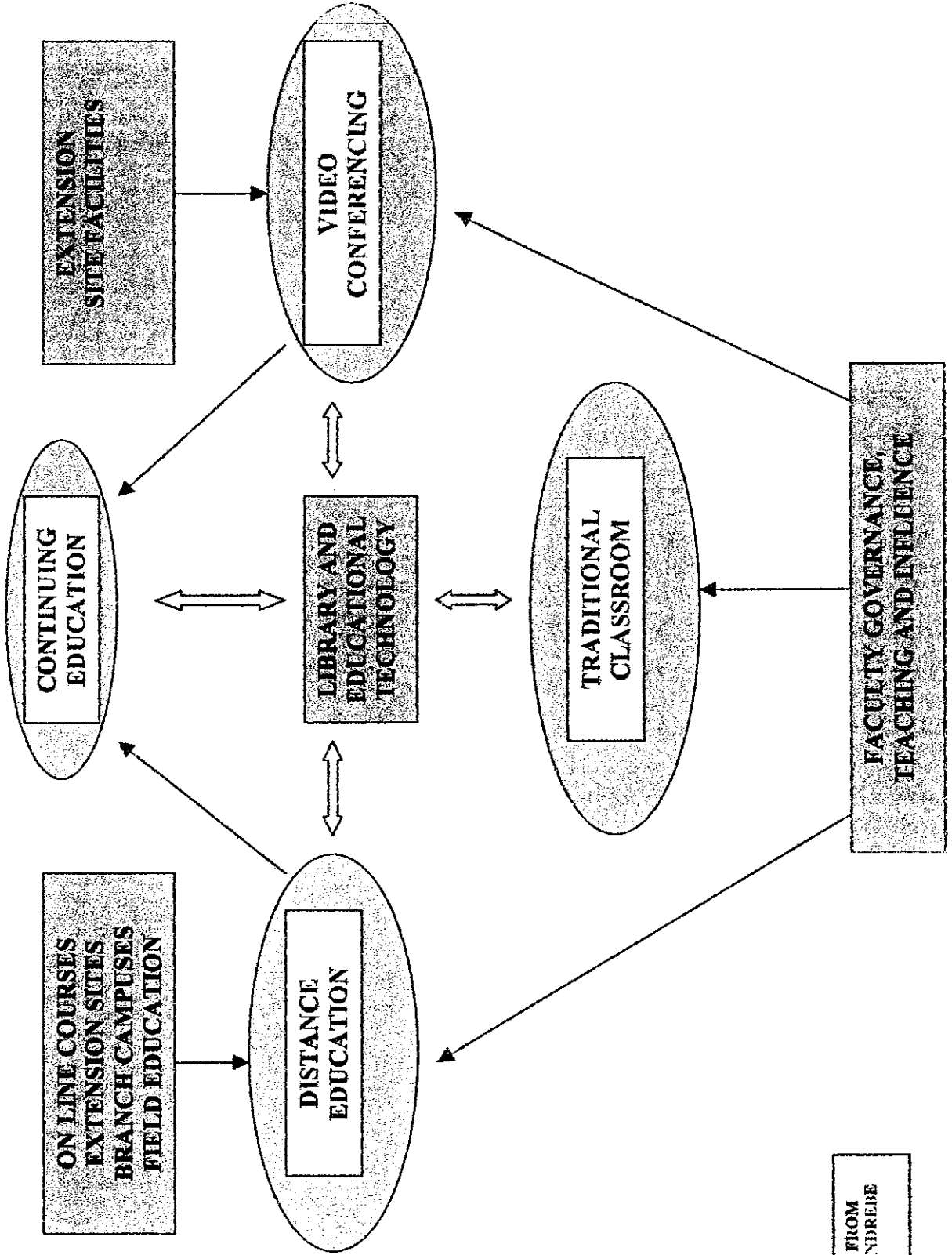
Educational Outcomes Assessment:

The ATS standards require a school to have a process whereby educational outcomes can be assessed.

A Vision of Quality for a caring institutional community. An acition plan is to be drafted.

MEADVILLE LOMBARD THEOLOGICAL SCHOOL

Integrated Educational System



ADAPTED FROM
ROBERT LANDREBE

**MEADVILLE LOMBARD THEOLOGICAL SCHOOL
GOING FORWARD**

Framework for Enrollment Marketing Plan

ENVIRONMENT ANALYSIS

Preliminary Questions:

1. Why do students come to Meadville Lombard Theological School?
2. What are the characteristics of the students who enroll?
3. What are the salient characteristics of the campus environment?
4. What are the characteristics of the continuing students? (Retention)
5. What are the characteristics of students who withdraw?
6. How do students benefit from attending Meadville Lombard?

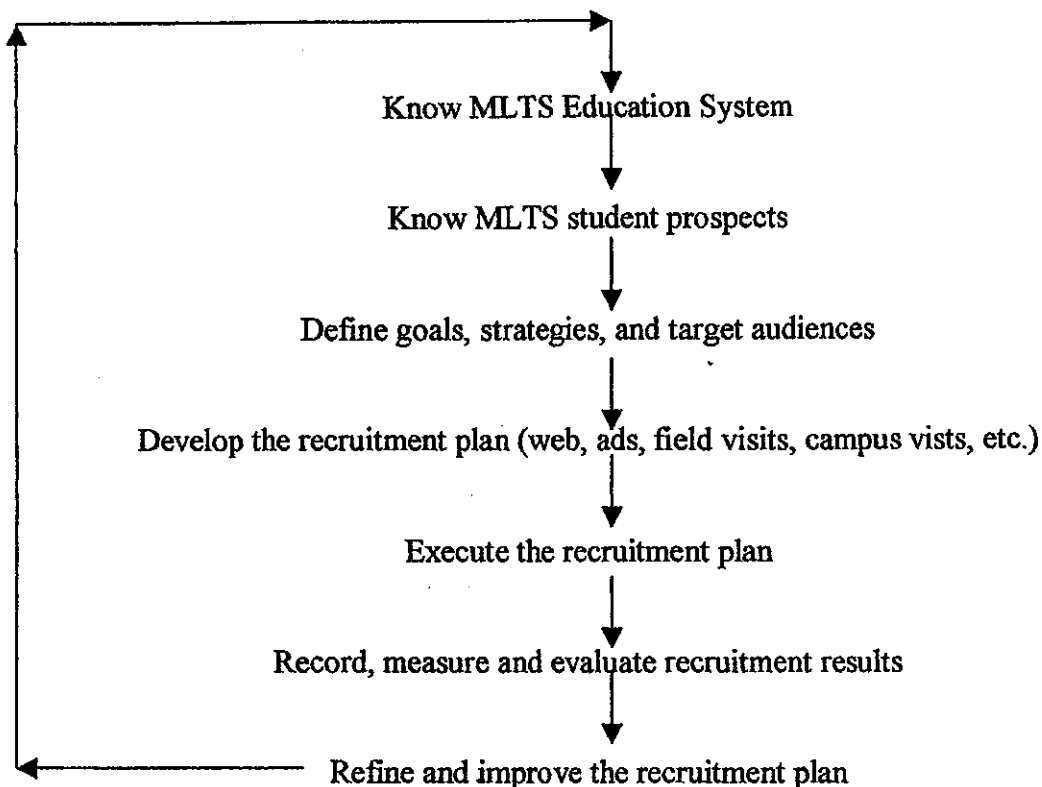
The answers to the preliminary questions will influence the following:

1. What and who constitute market potential?
2. Can we project enrollment goals from market potential?
3. What are the influences resident within the spheres of choice process?
4. Do we have an effective pricing structure and financial aid plan?
5. What is our plan to retain students?
6. How do we measure educational outcomes and how do these influence our marketing program?

With preliminary information, can we define a market intelligence system?

1. What is our market definition? Can we segment our market into subgroups?
How do we define these subgroups?
e.g. Market = progressive liberal theological education (generic)
Subgroup one: UUA related persons
Subgroup two: Liberal protestant students
Subgroup three: Liberal religion students
Subgroup four: Local persons looking for enrichment studies
2. Can we project market size and growth potential?
3. Do we understand our competitor's qualities?
4. Are there unfulfilled needs and demands in each of our market subgroups?
5. Other factors considered in defining market intelligence:
 - Importance of technology for delivering education (distance education, continuing education and video conferencing)
 - Economic issues—tuition price, financial aid, loans, scholarships, etc.
 - Contextual trends affecting theological education.
 - Internal issues—adequate faculty capacity, necessary facilities, available learning resources.

FROM ANALYSIS TO MARKET COMMUNICATIONS



MARKETING PLAN

- I. Market Position of MLTS
 - a. Our major markets
 - b. Our Market Intelligence
 - c. Our capabilities and unique strengths

- II. Opportunities and Problems
 - a. Internal (unique capabilities)
 - b. External (accessibility, competition, etc.)

- III. Objectives
 - a. Key assumptions for MLTS in each market
 - b. Goals
 - Prospects
 - Applications
 - Matriculates

- IV. Strategies to realize Objectives
 - a. Overall strategy stated
 - b. Strategies for each market

- V. Action Plan
 - a. Action for each market
 - b. Target dates and responsibilities
 - c. Control and review procedures

- VI. Summary of Market Plan impact on Enrollment Goals, FTE and Educational System.

Meadville Lombard Theological School
 Going Forward Revenue and Expense Projections

	6	6	6	8
Current Year 2006-2007 45 FTE	Year 1 2007-2008 Building Year	Year 2 2008-2009 55 FTE	Year 3 2009-2010 65 FTE	Year 4 2010-2011 75 FTE
Revenue				
Gross Tuition before Online Courses	652,450			
Scholarships	(193,830)			
Net ~70%	458,620	458,620	574,695	696,520
			828,240	
Application	900	900	1,350	1,800
Matriculation (New Student Fee)	1,250	1,250	1,750	2,250
Registration Fees	21,110	21,110	23,960	26,810
Comprehensive Fee	12,705	12,705	13,755	14,805
DMin Consultation Fees	1,000	1,000	1,000	1,000
Graduation Fees	1,250	1,250	1,250	1,250
January Convocation Fees	5,700	5,700	6,450	7,200
Internship (includes conference fee)	7,200	7,200	7,200	10,200
Praxis (MRP)	750	750	750	1,000
Clinical Pastoral Education	1,120	1,120	1,820	2,520
	52,985	52,985	59,285	68,835
	511,605	511,605	633,980	765,355
Development Gift Receipts	883,000	971,300	1,068,430	1,175,273
Reduction in Rental Income - Office Conversion		(8,250)	(8,250)	(8,250)
Total	1,853,225	1,933,275	2,268,855	2,628,898
		3,015,465		
New Revenue over 2006-2007		80,050	415,630	775,673
		1,162,240		
New Expenses				
Visiting Professors/Faculty Personnel		15,000	50,000	60,000
Provost (10 months in 07-08)				
Internship Coordinator -				
Dean of Enrollment Services (10 months in 07-08)				
Office of Admissions (10 months in 07-08)				
Business Manager				
Less eliminated position				
Increased Staff	9,250	312,500	332,600	309,800
Operating Expenses				
Personnel Related Expenses - Planning & Search	4,000	10,000		
Advertising & Promotion	50,000	50,000	50,000	50,000
Classroom Space Rentals		5,000	5,000	5,000
Planning - consulting & committee expenses	25,000	20,000		
Education Consultant		10,000		
Information Technology Consultant			10,000	
Information Technology - program implementation, software, equipment, regional classrooms, etc.				50,000
Increased Operational Expenses	500	40,000	30,000	30,000
Loss of rental income for Office Space Conversion		8,250	8,250	8,250
Transition Expenses	25,000	25,000		
Total Increased Expenses	113,750	495,750	485,850	513,050
Annual Budget Impact (new revenue less new expenses)	(113,750)	(415,700)	(70,220)	262,623
Cumulative Impact	(113,750)	(529,450)	(599,670)	312,143

2008-2009

Tuition increase on 45 FTE
Less provision for scholarship increases
10 new FTE @ 10,190 net tuition
Total Net Tuition Increase - 55 FTE

20,250
(6,075)
101,900
116,075

2009-2010

Tuition Increase on 55 FTE
Less provision for scholarship increases
10 new FTE @ 10,450 net tuition
Net Tuition Increase - 65 FTE

24,750
(7,425)
104,500
121,825

2010-2011

Tuition Increase on 65 FTE
Less provision for scholarship increases
10 new FTE @ 10,715 net tuition
Net Tuition Increase - 75 FTE

35,100
(10,530)
107,150
131,720

Revised 4/30/07

MEADVILLE LOMBARD THEOLOGICAL SCHOOL
Strategic Process toward Enrollment Plan to Increase FTE
ASSUMPTIONS

1. Identified strategic issues and their resolution will drive the planning process. Three issues have been identified; **Mission, Excellence, and Economic Vitality**.
2. The process will be flexible and permit strategic responses to be implemented as planning continues.
3. The board, administration and faculty, through shared governance procedures will evaluate and own plan decisions and intentions.
4. The changes envisioned in the plan will be implemented without delay.
5. MLTS will be organized for action and change.
6. It is expected that the board, administration and faculty each will have their roles to implement in moving forward through the planning processes to achieve final actions with authorizations.
7. Be confident about the future but realistic about what can be achieved.
8. Work hard toward long-term goals while striving for an immediate impact (2007).
9. Build strategic thinking into everyday MLTS life.
10. When making day-to-day decisions, the administration and faculty will consider the long-term implications before committing to action.
11. Adjust plans as circumstances change—radically if necessary.
12. In a changing environment, everyone must find ways to improve their contribution and skills.
13. Exceptions to the plan are not allowed unless authorized by the board.
14. The business plan will be based upon realistic enrollment estimates.
15. The focus will be upon the positive aspects of change through increased enrollment.
16. Communications will be central and will lead the planning process. If people do not know what you are trying to do, they cannot help you.
17. The strategic planning process should be fun as well as challenging.