

Approved by the Trinity Board of Trustees 11/7/2014

ENVISION TRINITY 2020: STRATEGIC PLAN 2013 - 2020



Trinity Washington University
125 Michigan Avenue, Washington, DC 20017
www.trinitydc.edu

ENVISION TRINITY 2020:

STRATEGIC PLAN FOR THE PERIOD 2013 - 2020

Envision Trinity 2020 continues the planning thread that began in the early 1990's with *Toward Trinity 2000*, the plan that guided the 1996 Middle States self-study. In May 2000, the Board of Trustees adopted a revised plan, *Beyond Trinity 2000*, that built upon the earlier plan's statements of vision and values, but with more measurable goals. At the time of the adoption of *Beyond Trinity 2000*, Trinity also adopted a new mission statement, and reorganized into the university structure with three academic schools. *Beyond Trinity 2000* formed the basis for institutional assessment in the 2006 Middle States self-study. Following that accreditation moment, Trinity revised the strategic plan to *Achieving Trinity 2010*, the plan that formed the basis for a successful Periodic Review Report to Middle States in 2011.

Continuing the same format as the three previous plans, and with the ongoing intention to use the strategic plan as the platform for assessment and self-study, *Envision Trinity 2020* updates the statements of goals that flowed through the prior plans, and builds upon the same statement of mission, providing the basis for the 2016 Middle States Self-Study.

I. MISSION

Trinity's Mission Statement confirms Trinity's historic commitment to women, to liberal learning and to the Catholic faith tradition while articulating those commitments in new ways for new student populations.

Trinity Mission Statement

Trinity is a comprehensive university offering a broad range of educational programs that prepare students across the lifespan for the intellectual, ethical and spiritual dimensions of contemporary work, civic and family life. Trinity's core mission values and characteristics emphasize:

- ❖ *Commitment to the Education of Women* in a particular way through the design and pedagogy of the historic undergraduate women's college, and by advancing principles of equity, justice and honor in the education of women and men in all other programs;
- ❖ *Foundation for Learning in the Liberal Arts* through the curriculum design in all undergraduate degree programs and through emphasis on the knowledge, skills and values of liberal learning in all graduate and professional programs;
- ❖ *Integration of Liberal Learning with Professional Preparation* through applied and experiential learning opportunities in all programs;
- ❖ *Grounding in the mission of the Sisters of Notre Dame de Namur and the Catholic tradition*, welcoming persons of all faiths, in order to achieve the larger purposes of learning in the human search for meaning and fulfillment.

II. VISION

Proceeding from mission, Trinity's vision anticipates developing the institution as a mid-sized university (more than 3,000 students including all degree levels, full-time and part-time, online and off-site as well as on campus) with a distinctive focus on the educational needs of the citizens of the Washington region generally and the District of Columbia in particular. Given the characteristics of the Washington region, this regional focus is not narrow or parochial; Washington is one of the most international communities in the nation, and has a broad diversity of race, ethnicity, socio-economics, languages, cultures, corporate and civic interests.

In particular, Trinity's vision includes these important principles and values:

- *A Value-Centered Education* infused with the principles of social justice, honor and integrity will continue to characterize Trinity's learning environment and programs;
- *Ensuring Access to Educational Opportunities* will continue to arise from that social justice value center, such that Trinity will continue to develop its curricula and programs in ways that provide opportunities for educational attainment for students who might otherwise not have had such opportunities to succeed academically;
- *Respect for Human Dignity* will continue to characterize Trinity's campus life through honoring the broad diversity of races, ethnicities, cultures, languages, abilities, beliefs and interests of Trinity's student body;
- *Academic Excellence and Rigor* will continue to characterize the expectations and work of the faculty with all student populations, with a clear focus on educational outcomes that can demonstrate the quality and durability of a Trinity education through many different occupations and life circumstances;
- *Women's Leadership Development* will continue to be a distinctive characteristic of all Trinity educational programs;
- *Education for Global Leadership* will continue as Trinity's theme to signify the global perspective that Trinity expects its students and graduates to manifest in order to be true leaders in contemporary communities, corporations, schools and public arenas;
- *Service to Others* will continue as a strong focus of Trinity's programs and leadership development philosophy;
- *Educating Children Well* will continue to be a particular emphasis of a Trinity education, not only in the School of Education but through all programs that lay the foundation for successful teaching, parenting and role modeling for the next generations of citizen leaders.

III. Environment, Assumptions, Benchmarks

Trinity has developed the strategic plan *Envision Trinity 2020* in an environment fraught with considerable challenge for institutions of higher education nationally and locally. At the outset, in 2013-2014, this planning document acknowledges these factors influencing the environment for higher education nationally and Trinity's environment locally:

National Environmental Factors Affecting Higher Education Broadly:

- Declining population of traditional-age students graduating from high school
- Changing demographics with dramatic rise in Hispanic population
- Increased demand for college access for low income students
- Regulatory pressures to improve retention and completion of college students
- Excessive federal regulation in all areas
- Changes in political landscape
- Student loan debt burdens
- Pell Grant limits
- New competition: online, for-profit, "pop-up" degrees and other providers
- Popular media questioning value of college
- Demand for more accountability measured in salaries and employment of grads
- Increasing concern about U.S. competitive ability in STEM disciplines
- Impact of sports on collegiate perceptions of traditional-age students and families
- Generational change in faculty and university administration

Local Environmental Factors Affecting Higher Education in the Washington Region:

- Washington region continues great wealth and high educational attainment
- Increased gap between rich and poor in the region
- District of Columbia literacy gap
- D.C. Public Schools educational gap
- Lack of significant need-based aid for D.C. students
- Threats to D.C. TAG
- End of D.C. Achievers Grants (2017)

Trinity takes these and other environmental factors into account in planning academic programs, enrollment and services to support enrollments, administrative capacity and improvements in facilities and technologies. The factors listed above influence Trinity's choices in strategic planning.

A. Assumptions

Trinity has developed the goals of *Envision Trinity 2000* with the following assumptions that flow from the environmental factors as well as assessment of Trinity's performance against goals in the earlier strategic plans:

- Demand for higher education in the Washington region will remain strong but will focus more acutely on diversified programs and degree levels leading to workforce advancement in the key employment fields in the region;
- Demand for education and credentials in the Washington region will remain strong in these particular fields:
 - health professions including direct services, mental health as well as physical, administration and education;
 - education of teachers and school leaders;
 - science disciplines especially those related to key areas of federal research and private investment, e.g., biotechnology, environmental, health
 - nonprofit advocacy and leadership;
 - media including social media and broadcast, business and technical;
 - international affairs including politics, business and diplomacy;
 - education for the professional services industries that proliferate in Washington including law, financial services, hospitality and tourism, lobbying and advocacy;
- Trinity's historic academic strengths and capacity are in general liberal arts and sciences, and those professional career fields that build on strong liberal learning foundations, e.g., teacher and school leader education, health professions, general business;
- Trinity is unlikely to develop expertise in entirely new disciplinary fields where Trinity does not have core competencies, e.g., computer science, engineering;
- Trinity will remain focused on teaching, not research;
- Trinity will increase focus on graduate-level education in keeping with the desire of the Washington regional workforce to advance through levels of educational credentials;
- Trinity will evaluate the potential for offering degrees at the doctoral level where Trinity already has proven competence at the baccalaureate and master's levels;
- Trinity will enlarge capacity for online delivery but will remain primarily campus-based.

B. Benchmarks

For many years, Trinity has developed benchmarks for performance using a cohort group of similarly sized historic women's colleges and Catholic women's colleges in urban centers. The cohort includes these schools:

Alverno College, Milwaukee, WI
 Carlow University, Pittsburgh, PA
 Cedar Crest College, Allentown, PA
 Chatham University, Pittsburgh, PA
 Chestnut Hill College, Philadelphia, PA
 College of New Rochelle, New Rochelle, NY
 College of St. Benedict, St. Cloud, MN
 College of Saint Elizabeth, Morristown, NJ
 Emmanuel College, Boston, MA
 Hood College, Frederick, MD
 Immaculata University, Immaculata, PA
 Lesley University, Cambridge, MA
 Manhattanville College, Purchase, NY
 Marymount Manhattan, New York, NY
 Marymount University, Arlington, VA
 Meredith College, Raleigh, NC
 Mount Saint Mary's, Los Angeles, CA
 Notre Dame of Maryland University, Baltimore, MD
 Rosemont College, Rosemont, PA
 Sage Colleges, Albany, NY
 Salem College, Winston-Salem, NC
 Simmons College, Boston, MA
 Stevenson University, Stevenson, MD
 University of Saint Joseph, West Hartford, CT
 Ursuline College, Pepper Pike, OH

References to benchmarks throughout this planning document usually use benchmarks derived from a cluster of all or some of these institutions unless otherwise noted.

For over 10 years, Trinity conducted an extensive ratio analysis to assess the financial health of the institution. Trinity's auditors BrownEdwards also provide critical financial indicators based on the performance of their client group which includes some of the same institutions in Trinity's cohort. Effective 2014, Trinity adopted the same analysis as Brown Edwards but also added the performance tracking of the 2014 bond covenants.

IV. STRATEGIC GOALS

Arising from the Mission and Vision, Trinity articulates the following strategic goals for *Envision Trinity 2020*.

► Strategic Goal 1: Enrollment Development

By the Year 2020 Trinity University will enroll 3,300 students in *degree programs* as follows:

- 1,200 full-time undergraduate women students in the College of Arts and Sciences
- 500 graduate students in the School of Education
- 600 part-time undergraduate students in the School of Professional Studies;
- 500 graduate students in the School of Business and Graduate Studies;
- 500 undergraduate and graduate students in the School of Nursing and Health Professions.

Appendix A: Enrollment includes the worksheets indicating how these enrollments will develop over time.

In order to achieve these goals, Trinity will create and will update periodically a five-year operational plan with specific annual goals and objectives that specify:

- Strategies for enrollment of new students in each program
- Strategies for retention of continuing students
- Strategies to improve completion rates

<i>Goal 1: Key Performance Indicators:</i>	Semester-by-Semester Progress Toward Goals Stated
<i>Reporting Cycle:</i>	Wkly Enrollment Reports; Final Semester Enrollments; Quarterly Board Reports

► Strategic Goal 2: Financial Performance

A. Financial Performance Goals:

Trinity will continue to demonstrate superior progress in meeting or surpassing externally benchmarked strategic financial ratios and critical financial indicators.

Appendix B: Financial Indicators shows the baseline data for this goal.

B. Fund Raising Goals:

1. Annual Fund

Trinity's Annual Fund performance will improve no less than 5% annually with a goal of reaching \$1.5 million by Fall 2020. To achieve this goal, the Annual Fund must also:

a) improve alumnae percentage participation by 5% annually overall to achieve an ultimate participation rate of 35% by 2020;

b) improve participation in cohort groups as follows:

(1) Overall CAS alumnae:

(a) CAS alumnae pre-1990:

(b) CAS alumnae post-1990:

(2) Alumnae and Alumni in the professional schools:

(a) SPS

(b) EDU

(c) BGS

(d) NHP

c) improve average gift sizes for each cohort.

In order to achieve these goals Trinity will produce a five-year operating plan for the Annual Fund that will include more detailed planning and action steps for the organization of volunteer segments, affinity groups and reunion giving in keeping with contemporary best practices for improving fund raising performance.

2. Major and Capital Gifts

Trinity will develop a five-year plan to build on the success of the Second Century Campaign that will address ongoing development activities to build resources for scholarships, academic programs, faculty support, technology and facilities infrastructure.

*Goal 2: Key Performance Indicators:
Reporting Cycle:*

Quarterly Progress Toward Goals Stated
Quarterly Board Reports

► **Strategic Goal 3: Program Development**

In keeping with the results of self-study and market research, Trinity will develop its curricula and programs to support the goals for enrollment growth as follows:

Appendix C: Strategic Program Initiatives provides more detail for this goal

- *College of Arts and Sciences:*
 - a) Project Completion: a comprehensive approach to improving retention, persistence and timely degree completion through delivery of advising and support services aligned to student needs, risk factors and incentives
 - b) First Year Experience: a revised FYE program, based on assessment results of the existing FYE program, will improve first-to-second year retention from 54% in Fall 2013 in progressive increments to achieve 75% as a consistent target by 2017 and hold or improve from that target by 2020
 - c) Sciences: with the new academic center and participation in the Clare Boothe Luce Program, Trinity will improve science enrollments significantly and to expand the institutional reputation for excellence for women and minorities in Math and Science.
 - d) International Affairs, Politics and Government: a comprehensive approach to enroll and support more International Affairs majors, through expansion of curricular opportunities, co-curricular and study abroad
 - e) Psychology, Human Relations, Behavioral Sciences and Business: currently among the largest major programs, Trinity will continue to strengthen these key programs through innovative pedagogies and clear statements of outcomes including more intentional links to graduate and professional programs as well as career pathways.

- *School of Professional Studies:*
 - a) Undergraduate Business Administration
 - (1) Accounting
 - (2) Human Resource Management
 - (3) Hospitality and Hotel Management
 - (4) General Business Administration
 - b) Behavioral Sciences
 - (1) Human Relations
 - (2) Psychology
 - b) Education: Early Childhood Education

- c) Criminal Justice
- d) Media Studies
- e) Online and Off-site delivery of programs

○ *School of Business and Graduate Studies:*

This new academic unit will provide the administrative infrastructure and faculty personnel necessary to achieve excellence in professional graduate programs, including:

- a) Masters in Business Administration
- b) Master of Science in Administration
- c) Media Studies and Strategic Communication
- d) International Security Studies

○ *School of Education:*

- a) Early Childhood Education
 - (1) Collaboration with SPS and CAS on undergraduate degrees
 - (2) Strengthen MAT ECE focus
 - (3) Add emphasis in EDAD on ECE management
- b) Education Policy
- c) Counseling
 - (1) CACREP Accreditation
- d) New regulatory and accreditation issues for teacher education
- e) Online and off-site

○ *School of Nursing and Health Professions:*

- a) Improving NCLEX performance in prelicensure program
- b) Expanding RN-BSN partnerships
- c) MSN
- d) Occupational Therapy OTA and MSN build-out
- e) Online opportunities
- f) Other Allied Health

*Goal 3: Key Performance Indicators:
Reporting Cycle:*

Program Speed-to-Market; Achievement of Program Enrollment Goals
Biweekly Senior Staff and Dean's Reports; Quarterly Board Reports

► **Strategic Goal 4: Technology**

Trinity will sustain a technological environment that promotes academic excellence and innovation; effective, pervasive use of contemporary tools for research, communication and instructional delivery; and operational efficiency and effectiveness.

A. Technology Infrastructure

Trinity's technology infrastructure will meet contemporary standards for academic institutions of Trinity's size and programmatic profile. The technology management plan includes specific annual goals and benchmarks for:

1. System Reliability
2. Network Capacity
3. Hardware and Software acquisitions
4. Data Storage
5. Disaster Recovery
6. Sustainability
7. Connectivity
8. Telephony
9. Customer Satisfaction

B. Academic and Instructional Technology

Trinity's academic and instructional technology environment will ensure excellence and innovation in academic programs, pedagogies and research. The academic technology management plan includes specific goals and benchmarks for:

1. Moodle Course Management System
 - a) Goal: 95% adoption for all courses
 - b) Goal: proficiency levels for course websites
 - c) Goal: proficiency levels for faculty use of Moodle
2. Technology in Pedagogy
 - a) Goal: basic, advanced, creative use of tech tools...
 - b) Goal: ability of faculty to develop digital objects, e.g., use of video, simulation, GIFs, etc. developed by faculty
3. Student Academic Support
 - a) use of tech tools for early warning
 - b) tutoring and special instruction

4. Online Course and Program Delivery

- a) Hybrid
- b) 100% online

5. Library and Research Resources

C. Data and Information Technology and Assessment

Recognizing that sustaining a culture of assessment requires strong data and information technology, Trinity will build advanced capacity for data and information management across all institutional levels and programs in order to ensure the maximum use of assessment tools to inform institutional decisions and future initiatives.

- 1. Institutional Research
- 2. Management Capacity
- 3. Academic Assessment Capacity

D. Communications, Website and Social Media

Trinity will build and sustain an environment for excellence and effectiveness across all communication platforms including continuous development of Trinity's main website and maintenance of high standards for quality and engagement across numerous forms of social media reaching members of the internal campus community as well as external audiences of prospective students, alumnae/i, benefactors, employers and the general public.

E. Faculty and Staff Development

Through the Trinity Institute and other professional development opportunities, Trinity will provide education and training for all faculty and staff to make the best use of technological tools and communications platforms in teaching, research and administrative services.

*Goal 4 Key Performance Indicators:
Reporting Cycle:*

TBD in Tech Plans: Tech Services, Academic Tech, Library, Website
Monthly Management Reports; Quarterly Board Reports

► Strategic Goal 5: Human Resource Development

Consistent with Trinity's enrollment goals and programmatic development expectations, Trinity will develop its human resources to achieve the levels of performance quality in all areas that are necessary for institutional success.

A. Faculty

- Alignment of the size of the full-time and part-time faculty in each school to the size of enrollments in programs, consistent with disciplinary standards and industry benchmarks for program staffing;
- Hiring and promotion of a qualified diverse faculty body that reflect Trinity's diverse student population;
- Continuing improvement in full-time faculty compensation aligned with benchmarks;
- Creation of a compensation plan for adjunct faculty that recognizes and sustains academic talent;
- Development of a more comprehensive faculty development program to provide continuous education in pedagogy, curriculum reform, classroom management techniques, research and scholarship, use of technological tools, and ongoing professional enhancements for the faculty;
- Development of the *Faculty Handbook* policies in relation to contemporary realities for workload, delivery systems, technological innovation and professional development.

B. Staff

- Continuing development of the staff performance assessment system including production of management data based on assessments that provide targets for staff development and compensation planning;
- Continuing development of the Trinity Institute staff professional development programs to improve staff knowledge, skills and competencies in supervision and management, technology and applications, teamwork and project planning, and related skill sets;
- Development of the Wage and Salary Plan to provide greater flexibility in the recognition of staff performance tied to goals;
- Promotion of a climate for innovation and cross-functional teamwork among all administrative departments, and with faculty, to improve Trinity's ability to recruit and retain students successfully.
- Hiring and promotion of a qualified and diverse staff that reflects Trinity's diverse student population.

*Goal 5: Key Performance Indicators:
Reporting Cycle:*

TBD: Academic Personnel Plan; Staff Development Plan
Weekly Senior Staff Report; Quarterly Board Report

► **Strategic Goal 6: Management Capacity**

In order to support the growth of programs and services that this plan requires to meet the enrollment and financial goals, Trinity must continue to develop its management capacity in all units to ensure strategic success. Accordingly, Trinity will:

- Create an institutional management design that provides sufficient talent to support achievement of strategic goals in every department and program
- With the leadership of each academic dean, a plan for the development of academic advising and other services to support each academic unit will specify the additional knowledge, skills and competencies necessary to manage the units successfully in fulfillment of unit performance goals;
- With the leadership of the senior executive staff, every subsidiary division and department will specify in their annual plans the knowledge, skills and competencies necessary to manage each division and department successfully in fulfillment of performance goals;
- Supervisors will receive ongoing education and training in management techniques to improve their ability to focus on achievement of goals and objectives as well as professionally develop and lead their teams in the achievement of goals and objectives;
- Senior managers and executives will also participate in ongoing education and training to improve their ability to professionally develop supervisors, and lead the staff and faculty teams to fulfillment of all goals.

Goal 6: Key Performance Indicators:
Reporting Cycle:

Unit Plans; Senior Management Plan
Biweekly Senior Staff; Quarterly Board

► **Strategic Goal 7: Intellectual and Informational Resources**

As a community of scholars with an emphasis on teaching, Trinity must pay close attention to the ongoing climate for intellectual productivity and leadership in disciplinary and professional arenas for both faculty and staff. The “teaching college” paradigm that Trinity cherishes should manifest itself in a broad variety of scholarly and professional activities that will enhance Trinity’s reputation while also contributing to the knowledge base --- at Trinity and in higher education generally --- in all fields, and particularly with regard to the education of students who mirror Trinity’s profile. Trinity has the potential to make significant contributions to programmatic and pedagogical models throughout education at all levels. In this way, Trinity produces as well as uses intellectual resources.

Accordingly, Trinity will increase its attention to scholarly and professional productivity in these ways:

- Using web-based tools, and on a voluntary contribution basis, establishment of a clearinghouse for faculty and staff access to the scholarly and professional development work of colleagues, including works in progress as well as completed materials;
- Creation of a more distinctive focus on the importance of active contributions to the knowledge base, including establishment of appropriate symbols to recognize and reward exemplars --- prizes and awards, dinners and luncheons, lectures and displays, all focused on ideas, papers, projects, publications and contributions of Trinity faculty and staff;
- Identification of specific incentives to improve intellectual productivity, including grants, professional development funds, compensation recognition, and other forms of tangible recognition.

Along with promoting the development of intellectual resources broadly, Trinity will also enhance institutional focus on the development of the informational resources necessary to support the teaching and learning enterprise.

- With the leadership of the Provost and librarian, Trinity will develop a strategic plan for the development of the Library and its resources.

Goal 7: Key Performance Indicators:
Reporting Cycle:

Publications and Substantive Participation in External Professional Groups
Continuous on web; Semester Summary; Annual Report

► **Strategic Goal 8: Service to Students and the Community**

In fulfillment of Trinity’s mission to educate students across the lifespan, Trinity will continue to develop innovative educational services and programs for students enrolled at Trinity as well as for citizens of the larger Washington community, including:

- For the campus community, Trinity will create annual plans with measurable goals for service delivery and effectiveness, and customer satisfaction, in these areas for all schools and programs:
 - Academic Advising
 - Learning Skills support
 - Career Services
 - Disability Support Services
 - Health Services
 - Campus Ministry
 - Residence Life
 - Student Government
 - Student Activities
 - Student Financial Services
 - Registration Services
 - Food Service
 - Bookstore
 - Facilities Services
 - Complaint Management

- Trinity will extend its educational and service talent to children, families and adults in neighborhoods, schools, civic organizations and other locations in the District of Columbia and the Washington Region. Trinity will develop a specific annual plan with measurable goals for institutional outreach.

- Through the Trinity Center for Women and Girls in Sports, Trinity will continue to offer wellness, fitness, recreational, educational and athletics programs and services to the larger Washington community as well as to the campus community; the annual plan for the Trinity Center includes measurable goals for these services;

Goal 8: Key Performance Indicators:
Reporting Cycle:

TBD According to Unit Plans
Weekly Senior Staff; Annual Report; Board Quarterly

► **Strategic Goal 9: Quality, Outcomes and Key Performance Indicators**

The quality of Trinity's performance is a significant factor contributing to the achievement of enrollment and financial goals. Hence, establishing goals for quality performance, stated as measurable outcomes, become an important part of institutional assessment.

Each of the previous eight goals includes a box at the bottom to identify Key Performance Indicators, which are overall targets by which quality performance can be measured. The boxes also indicate a timetable for reports to different groups on progress toward the goal. Consistent reporting of results on a regular timetable will enhance Trinity's ability to focus on improving outcomes.

Beyond the specific unit-by-unit and goal-by-goal statements of outcomes and key performance indicators, Trinity will also establish overall institutional plans and quality goals in these areas:

- Creation of a nationally-recognized First Year Program for the successful development of first year students who present preparatory challenges at entrance;
- Establishment of a model program for student learning outcomes assessment that links general education and major program goals effectively;
- Development of an Enrollment Management model that focuses on improving retention and completion rates through sophisticated analysis of and programming for factors that promote retention and completion and those that cause attrition and delays in the educational timetable;
- Implementation of a longitudinal assessment system that is able to track alumnae/i outcomes over time and link those outcomes to specific curricular goals;
- Creation of a service response system for all departments that improves Trinity's reputation among all constituencies for the quality, timeliness and effectiveness of service delivery;
- Promotion of a more vigorous public image for Trinity through more effective use of media to report the accomplishments of faculty, students, staff and alumnae.

Goal 9: Key Performance Indicators:
Reporting Cycle:

Establishment of Goals and External Benchmarks for Performance
Monthly in Senior Staff Meeting; Quarterly Board; Annual Summary

► **Strategic Goal 10: Facilities and Campaign Planning**

By the Year 2020 Trinity will realize these facilities goals:

- Trinity Academic Center Construction completed and building open
- Library re-development plan in place
- Construction of new/renovated residential facilities will be underway;
- Facilities upgrades for fire and life safety purposes will be continuous;
- Improvements in Main Hall infrastructure will be continuous;
- Completion of the Alumnae Hall Campus Center Project will be on the drawing board.

In order to re-develop the library and continue other facilities improvements, Trinity will plan a major capital campaign to raise no less than \$50 million in support of facilities projects during the period 2020-2025.

<i>Goal 10: Key Performance Indicators:</i>	Facilities Timetable TBD; Campaign Plan TBD
<i>Reporting Cycle:</i>	Monthly Facilities Reports; Master Plan Filing; Quarterly Board



Envision Trinity 2020:

Strategic Plan 2013-2020

Appendices supporting plan goals



INTRODUCTION

Envision Trinity 2020 establishes the framework for institutional, operational and programmatic strategies to fulfill Trinity's strategic goals. This plan emanates from Trinity's mission and vision to sustain Trinity as a global model for the education of students, particularly women and men in urban centers, who seek to become leaders for change in their families, workplaces and communities.

This strategic plan continues the threads established in Trinity's prior strategic plans from *Toward Trinity 2000 (1992-1999)*, *Beyond Trinity 2000 (2000-2006)*, and *Achieving Trinity 2010 (2007 – 2013)*.

Continuing the same format as the prior plans, *Envision Trinity 2020* establishes new measurable goals and clear benchmarks for achievement of the goals. Each goal includes a statement of baseline measurements in the Year 2014 and establishes annual progress goals and ultimate strategic goal targets for 2020.

BY THE YEAR 2020 TRINITY WILL:

- Enroll 3300 students in all units and programs
- Meet or exceed financial benchmarks
- Offer fully enrolled programs in each academic unit that meet or exceed contemporary academic and professional standards for outcomes, delivered in all contemporary formats and meeting benchmarks for retention and completion
- Sustain a fully digital and virtual campus with pervasive portable technologies facilitating delivery of instruction and services across all units and departments, reaching students and graduates worldwide
- Employ a body of faculty and staff of the size and capacity necessary to deliver the quality and scope of programs and services
- Have an administrative structure, leadership and management capacity sufficient to ensure effective delivery of Trinity's programs and services
- Create and manage a body of intellectual and informational resources adequate to support the academic enterprise and that also contribute significantly to the advancement of knowledge in the respective disciplines
- Be a national model for exceptional services to students and the larger community
- Meet or exceed external standards for quality and outcomes
- Operate in a new academic center, upgraded Main Hall and residential facilities, and have a plan in place for library redevelopment

Trinity Mission Statement

Trinity is a comprehensive university offering a broad range of educational programs that prepare students across the lifespan for the intellectual, ethical and spiritual dimensions of contemporary work, civic and family life.

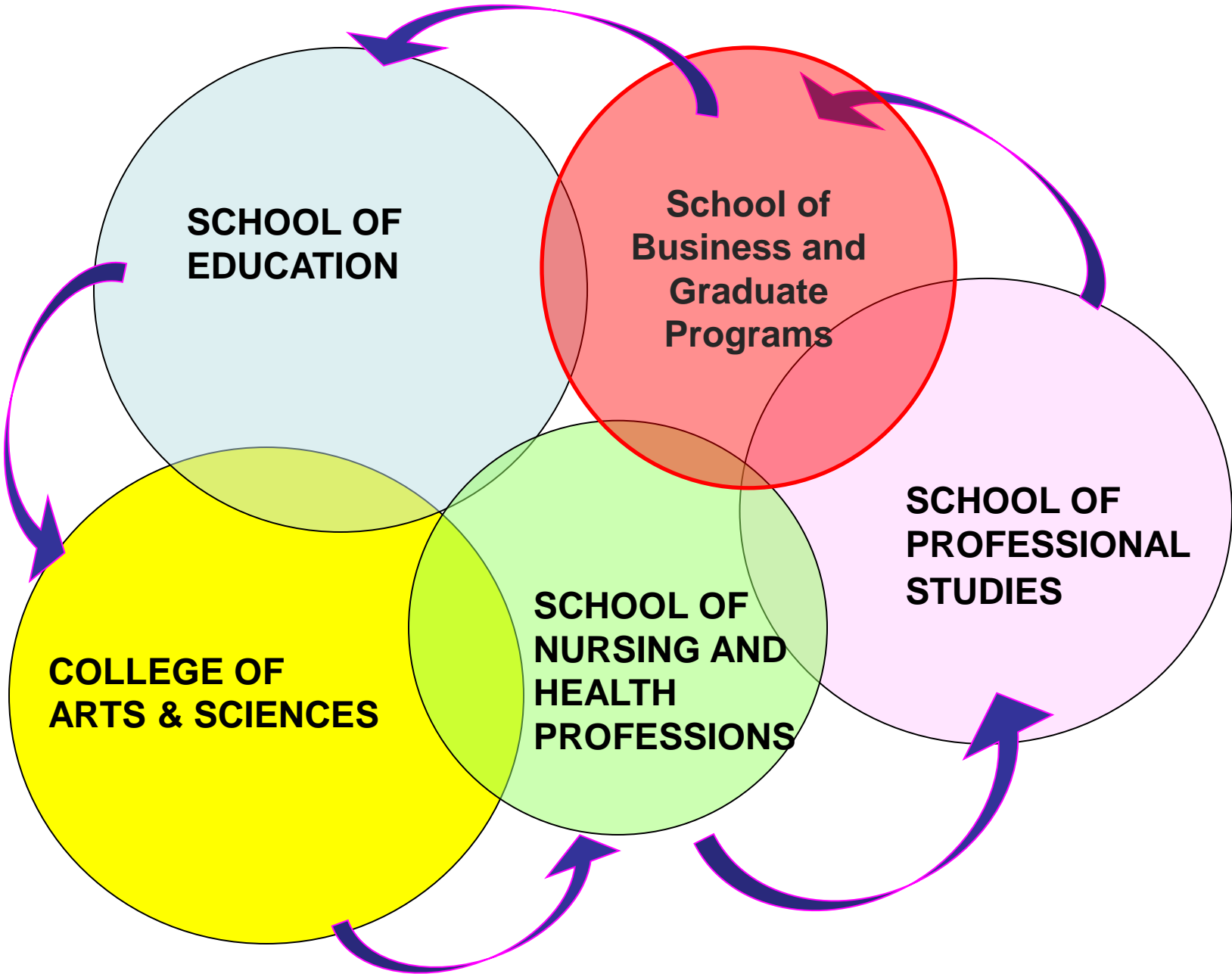
Trinity's core mission values and characteristics emphasize:

- *Commitment to the Education of Women* in a particular way through the design and pedagogy of the historic undergraduate women's college, and by advancing principles of equity, justice and honor in the education of women and men in all other programs;
- *Foundation for Learning in the Liberal Arts* through the curriculum design in all undergraduate degree programs and through emphasis on the knowledge, skills and values of liberal learning in all graduate and professional programs;
- *Integration of Liberal Learning with Professional Preparation* through applied and experiential learning opportunities in all programs;
- *Grounding in the mission of the Sisters of Notre Dame de Namur and the Catholic tradition*, welcoming persons of all faiths, in order to achieve the larger purposes of learning in the human search for meaning and fulfillment.

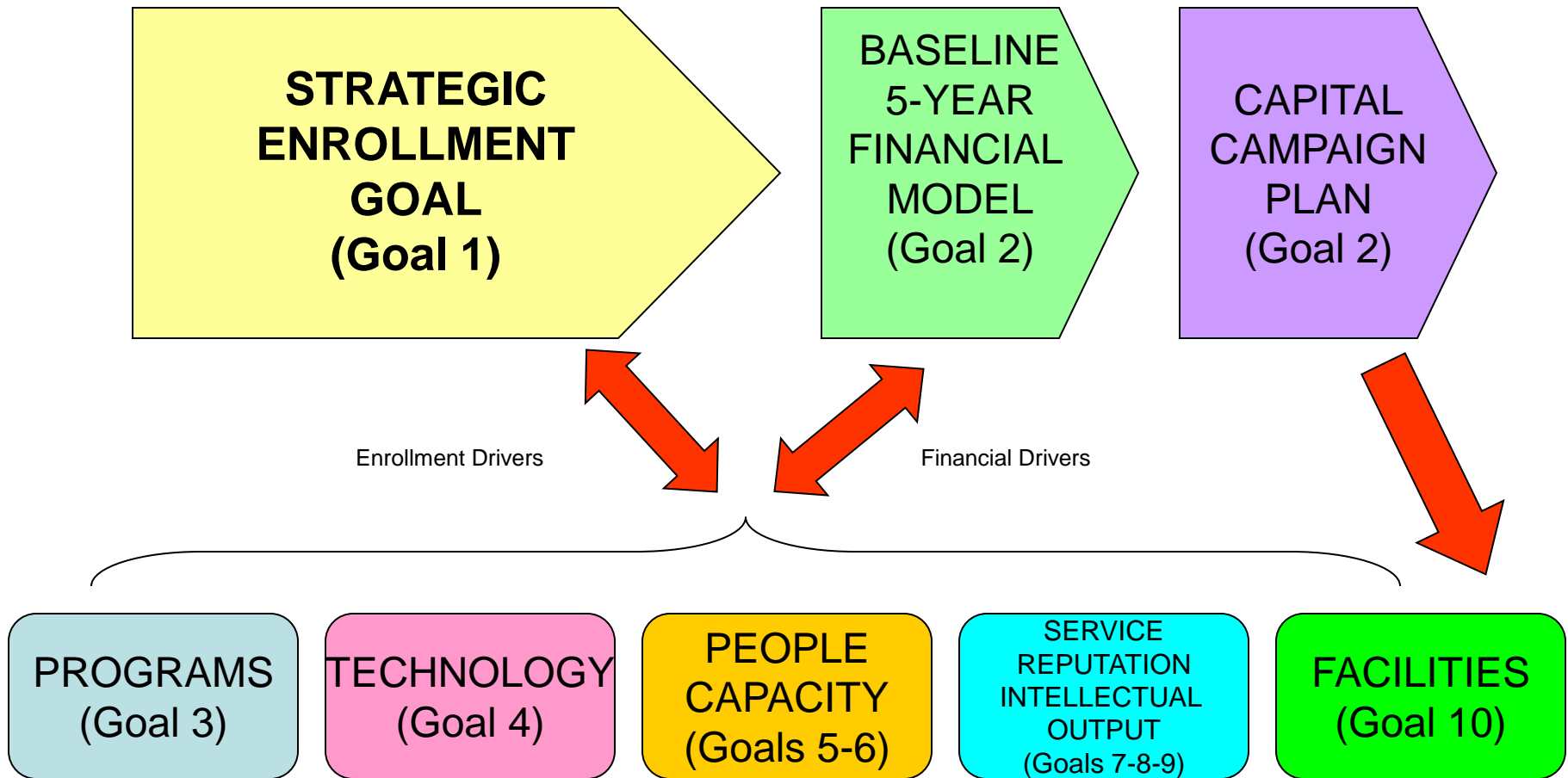
Trinity's Strategic Vision

Proceeding from mission, Trinity's vision anticipates developing the institution as a mid-sized university (3,500 students) with a distinctive focus on the educational needs of women and men across all ages and economic circumstances, with a particular emphasis on education for students in the Washington metropolitan region. Trinity sustains its historic emphasis on women's leadership and advancement even while expanding its reach to include men in all professional programs. Trinity's programs and services incorporate these values that emanate from Trinity's mission as a Catholic institution infused with the values of the Sisters of Notre Dame de Namur:

- *A Value-Centered Education* infused with the principles of social justice, honor and integrity will continue to characterize Trinity's learning environment and programs;
- *Ensuring Access to Educational Opportunities* will continue to arise from that social justice value center, such that Trinity will continue to develop its curricula and programs in ways that provide opportunities for educational attainment for students who might otherwise not have had such opportunities to succeed academically;
- *Respect for Human Dignity* will continue to characterize Trinity's campus life through honoring the broad diversity of races, ethnicities, cultures, languages, abilities, beliefs and interests of Trinity's student body;
- *Academic Excellence and Rigor* will continue to characterize the expectations and work of the faculty with all student populations, with a clear focus on educational outcomes that can demonstrate the quality and durability of a Trinity education through many different occupations and life circumstances;
- *Women's Leadership Development* will continue to be a distinctive characteristic of all Trinity educational programs;
- *Education for Global Leadership* will continue as Trinity's theme to signify the global perspective that Trinity expects its students and graduates to manifest in order to be true leaders in contemporary communities, corporations, schools and public arenas;
- *Service to Others* will continue as a strong focus of Trinity's programs and leadership development philosophy;
- *Educating Children Well* will continue to be a particular emphasis of a Trinity education, not only in the School of Education but through all programs that lay the foundation for successful teaching, parenting and role modeling for the next generations of citizen leaders.



STRATEGIC PLANNING DESIGN



Trinity Key Enrollment Performance Indicators Fall 2014

	Plan	FALL 2014	Fall 2013	Fall 2012	Fall 2011	Fall 2010	Fall 2009	Fall 2008	Fall 2007	Fall 2006
Enrollment	3000	2271	2500	2664	2555	2311	2030	1736	1640	1605
Retention (S-F)	90%	79%	79%	79%	81%	82%	82%	80%	80%	78%
Retention (F-F)	80%	71%	70%	72%	73%	72%	72%	71%	70%	
IPEDS GRAD RATE (COHORT YR)	55%	40% (2008)	34% (2007)	32% (2006)	45% (2005)	35% (2004)	38%/41% (2003)	40% (2002)	36% (2001)	52% (2000)
SUCCESS RATE (COHORT YR)	70%	68% (2008)	60% (2007)	57% (2006)	"Success Rate" is the measure of degree attainment or continuing enrollment for students in the baseline cohort who are still enrolled at Trinity or who have graduated from Trinity, or who are still enrolled or have graduated from another college.					
New CAS	350	363	363	346	367	334	328	263	270	188
CAS TOTAL	1100	1066	1079	1038	1006	962	810	659	648	583
Housing	347 (cap)	344	302	250	305	315	277	235	249	190
% CAS Housed	50% (425)	32%	28%	26%	30%	33%	34%	36%	38%	33%
FT Tuition	incr @ 3%	\$21,930	\$20,970	\$20,550	\$20,150	\$19,750	\$19,360	\$18,800	\$18,250	\$17,700
Trinity Grant	Not > 40%	\$8,772	\$8,388	\$8,220 est.	\$7,575	\$7,269	\$6,886	\$6,294	\$6,249	
Pell Grant %		75%	70%	70%	65%	60%	51%	68%	62%	

KEY FINANCIAL INDICATORS

	Fiscal Years:	FY14	FY13	FY12	FY11	FY10	FY09	FY08	FY07	FY06
Total Operating Revenues		\$ 34,013,169	\$ 36,311,193	\$ 35,988,929	\$ 32,287,938	\$ 29,056,328	\$ 24,878,042	\$ 23,607,883	\$ 23,388,541	\$ 23,348,394
Total Expenses		\$ 31,384,883	\$ 30,787,792	\$ 29,361,365	\$ 27,392,062	\$ 26,252,051	\$ 25,293,465	\$ 24,091,750	\$ 23,313,620	\$ 23,536,793
Changes in unrestricted net assets from operating activities		\$ 2,628,286	\$ 5,523,401	\$ 6,627,564	\$ 4,895,876	\$ 2,804,277	\$ (415,423)	\$ (483,867)	\$ 74,921	\$ (188,399)
Total Assets		\$ 101,479,444	\$ 86,170,872	\$ 72,960,840	\$ 66,464,778	\$ 58,573,525	\$ 53,860,492	\$ 59,059,174	\$ 60,660,284	\$ 58,424,520
Total Liabilities		\$ 23,616,312	\$ 23,154,959	\$ 24,272,886	\$ 24,289,184	\$ 24,433,342	\$ 23,868,840	\$ 23,486,521	\$ 23,869,456	\$ 24,214,907
Total Net Assets		\$ 77,863,132	\$ 63,015,913	\$ 48,687,954	\$ 42,175,594	\$ 34,140,183	\$ 29,991,652	\$ 35,572,653	\$ 36,790,828	\$ 34,209,613

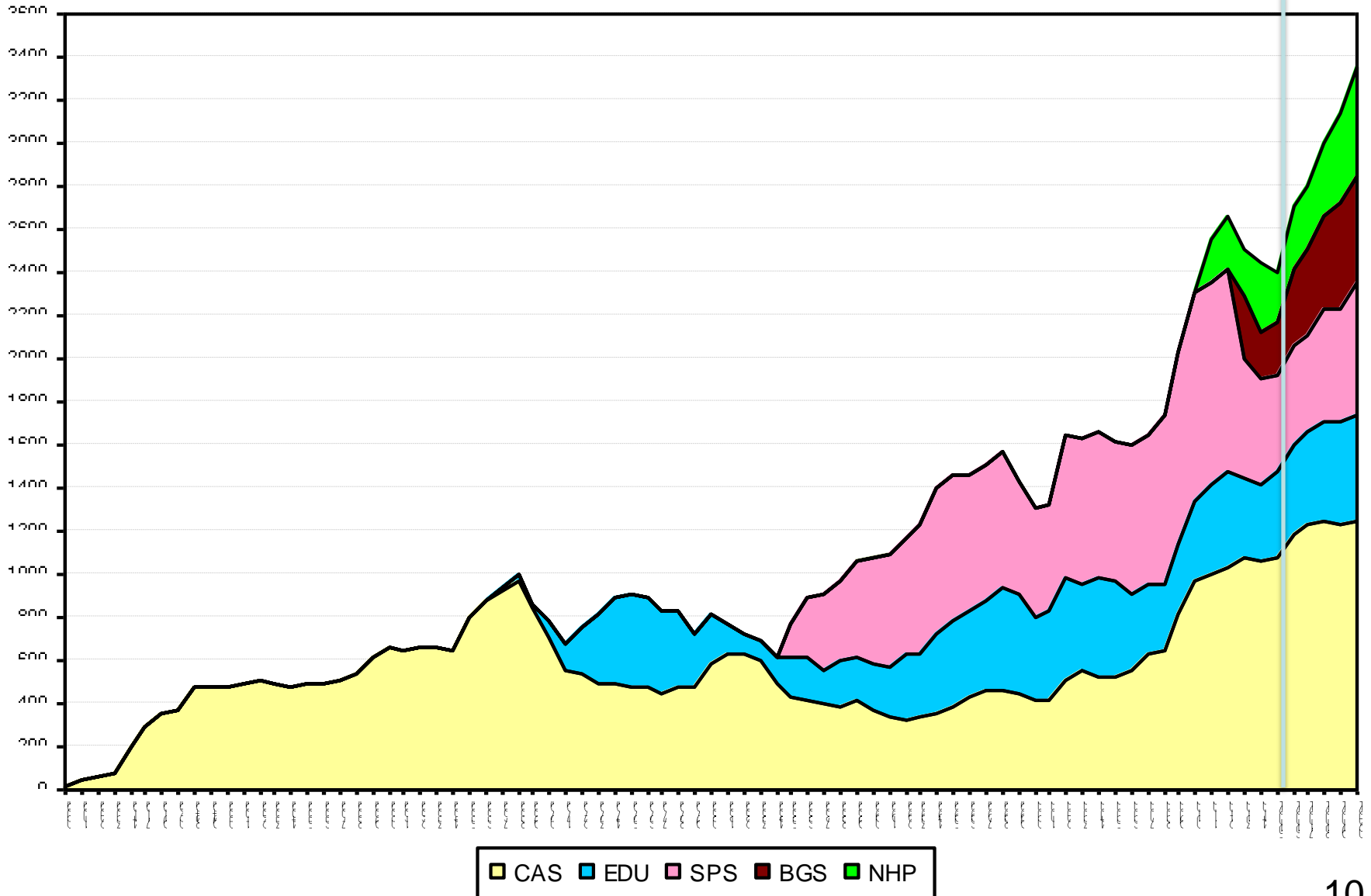
Trinity Key Academic and Personnel Performance Indicators Fall 2014

	Plan	FALL 2014	Fall 2013	Fall 2012	Fall 2011	Fall 2010	Fall 2009	Fall 2008	Fall 2007	Fall 2006
Faculty Salaries	95% of cohort avg	100% \$69,290	100% \$68,500	99% \$66,200	98% \$64,200	96% \$63,600	96% \$61,800	95% \$60,400	96% \$58,000	96% \$56,000
FT Instruction (Fac + Instrs)	130 (65% courses by FT fac)	77 (59 + 18)	88 (67+21)	83 (63 + 20)	76	65	59	57	54	53
PT Faculty	40% of courses	229	230	213	192	164	134	136	133	122
# Courses Taught		599	642	637	597	532	501	463	427	
% Courses Taught by FT	65%	42%	45%	45%	48%	50%	55%			
Total Employees		549	518	478	456					
FT STAFF		193	205	200	183	182	178	171		
Staff Turnover	15%	6% as of 9/1	21%	16%	17%	14%	18%	25%		
Other Key Performance Indicators										
Cohort Default Rate		12.7%	14.2%							

Strategic Goal 1: Enrollment

The following slides illustrate the details for enrollment growth by academic unit out to 2020

Enrollment Growth and Plan to 2020



STRATEGIC ENROLLMENT PLANNING Headcount 2013-2020

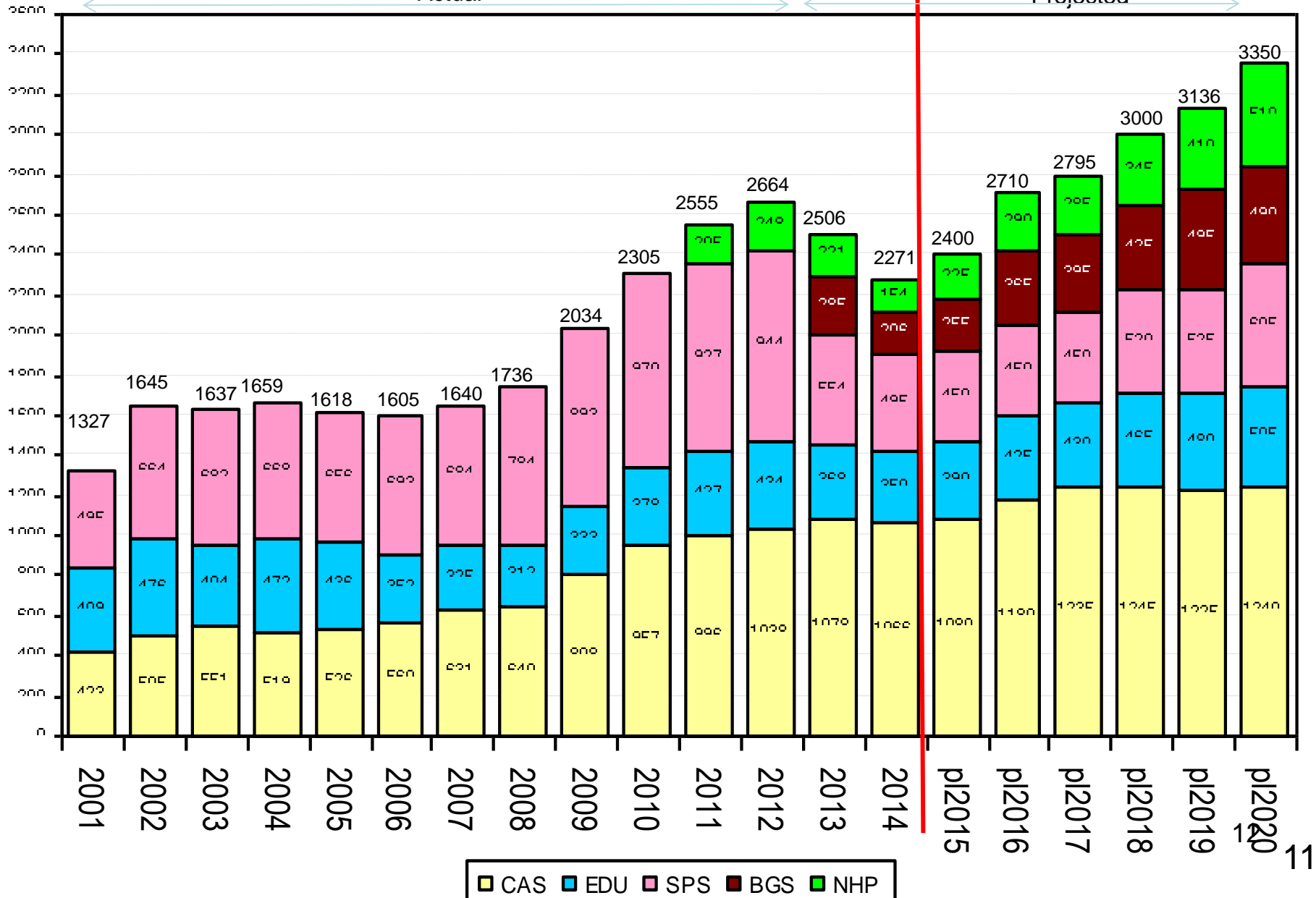
STRATEGIC ENROLLMENT MODEL SHOWING TOTAL FORECASTS BY ACADEMIC UNITS AND DEGREE LEVELS AS OF 9 14 2014																	
	FISCAL 2013		FISCAL 2014		FISCAL 2015		FISCAL 2016		FISCAL 2017		FISCAL 2018		FISCAL 2019		FISCAL 2020		FY 2021
	Fall 12 Act	Sp 13 Act	Fall 13 ACT	SP 14 ACT	Fall 2014 ACT	SP 15	Fall 2015	SP 16	Fall 2016	SP 17	Fall 2017	SP 18	Fall 2018	SP 19	Fall 2019	SP 20	Fall 2020
CAS	1038	969	1078	978	1066	980	1160	1097	1260	1188	1318	1200	1245	1125	1225	1135	1240
SPS AA	82	77	83	78	86	85	80	85	75	65	65	62	85	65	75	70	85
SPS UG	518	479	471	426	409	385	370	375	375	395	385	390	435	420	450	450	520
SPS GR	249	222	207	186	157	195	200	265	295	335	325	355	345	375	405	385	405
SPS MBA	95	82	78	69	49	65	55	75	70	75	70	75	80	80	90	70	85
NHP NRS	248	213	192	157	116	130	125	120	130	120	130	125	135	130	155	155	180
NHP OTA		10	29	29	38	35	50	45	55	40	43	25	58	30	68	50	85
NHP OTM							25	20	45	35	43	30	62	30	58	35	75
NHP RNMSN							25	45	60	55	70	70	90	85	130	140	170
EDU	434	401	368	340	350	355	390	405	425	425	430	435	465	455	480	450	505
TOTALS	2664	2453	2506	2263	2271	2230	2480	2532	2790	2733	2876	2769	3000	2795	3136	2940	3350

FALL ENROLLMENT HEADCOUNTS SINCE FALL 2001

NUMBER OF STUDENTS

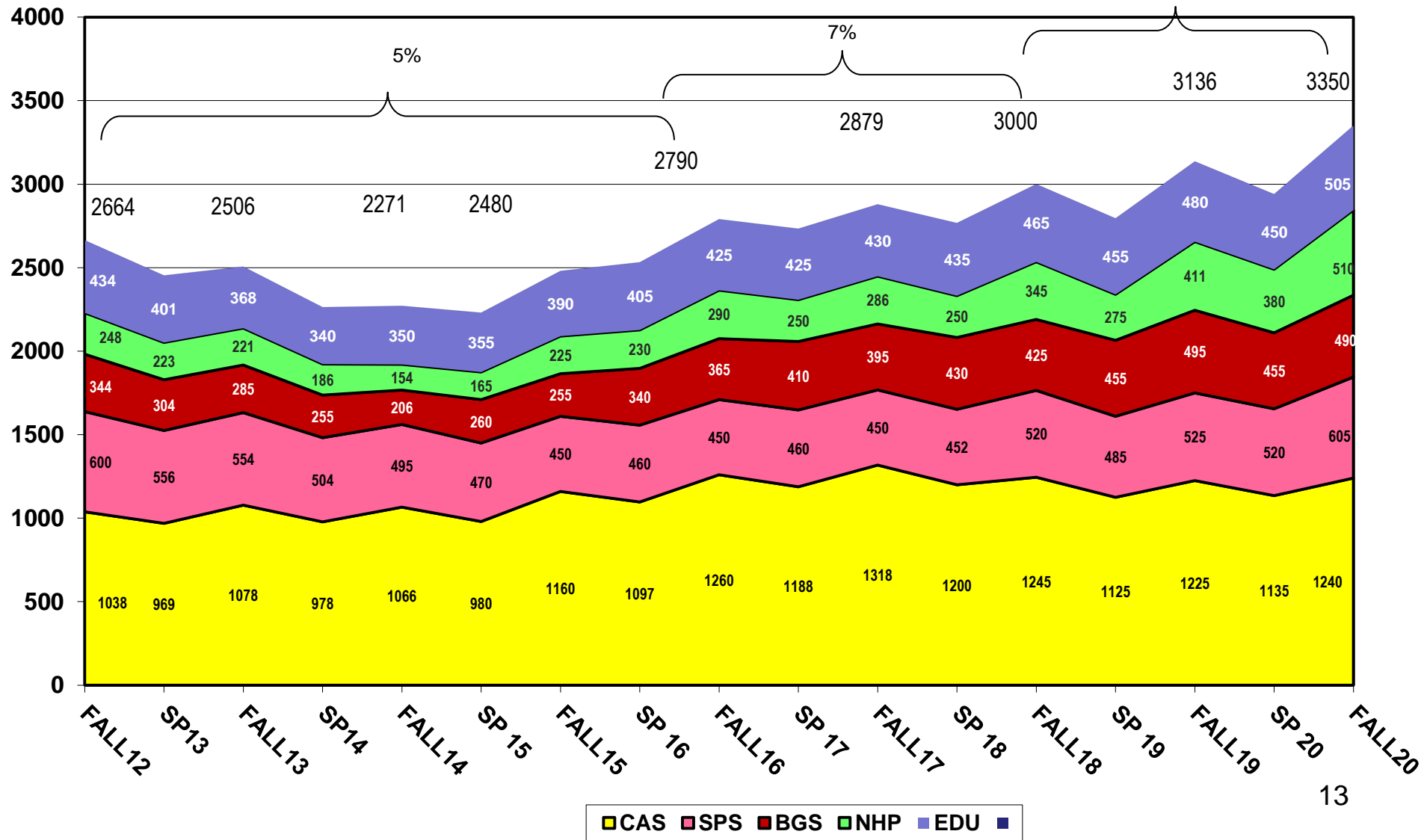
Actual

Projected



Strategic Enrollment Growth Volume and Rates 2012-2015

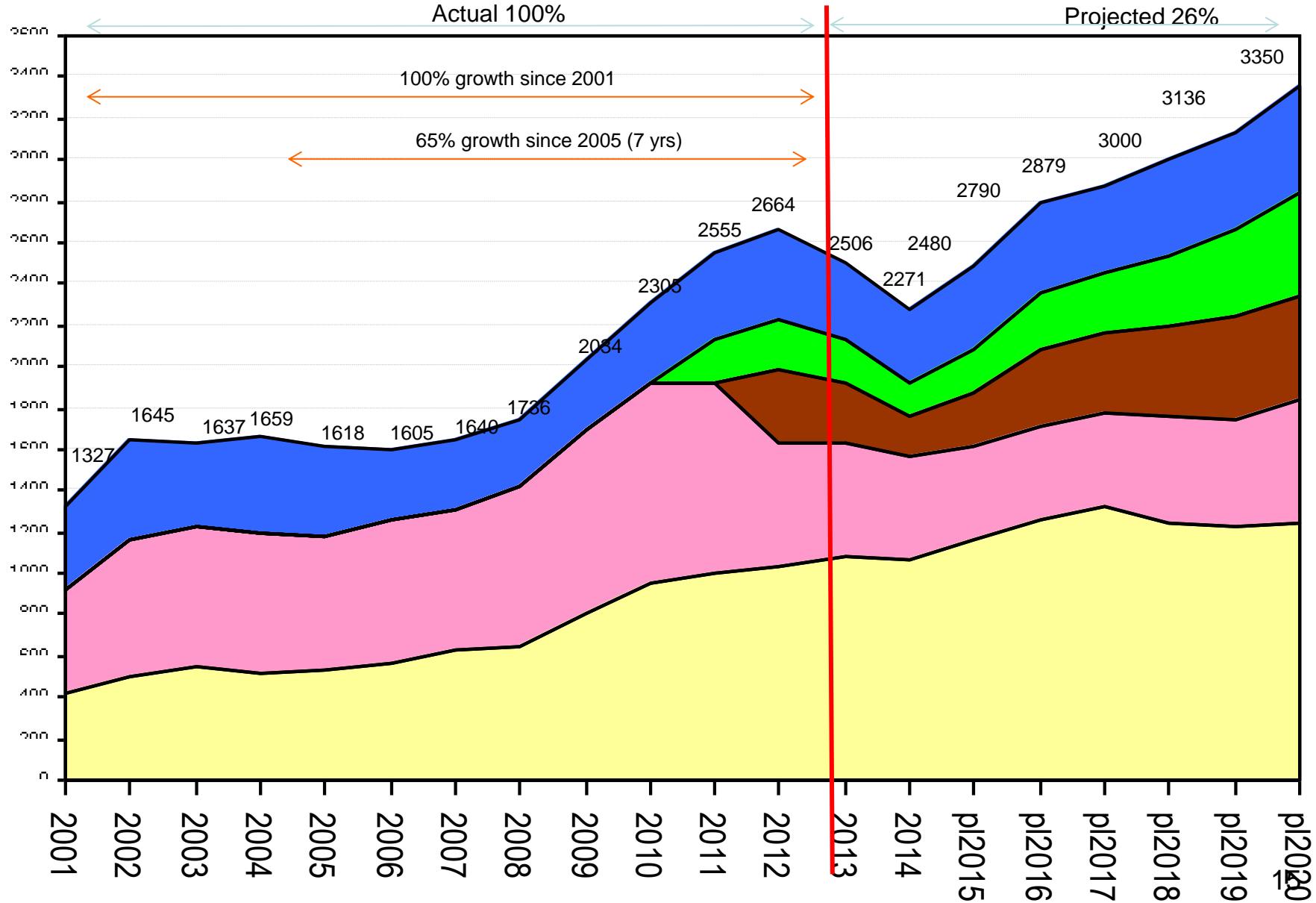
26% growth projected 2013-2020



Is that kind of growth
achievable? Consider how
growth occurred
retrospectively:

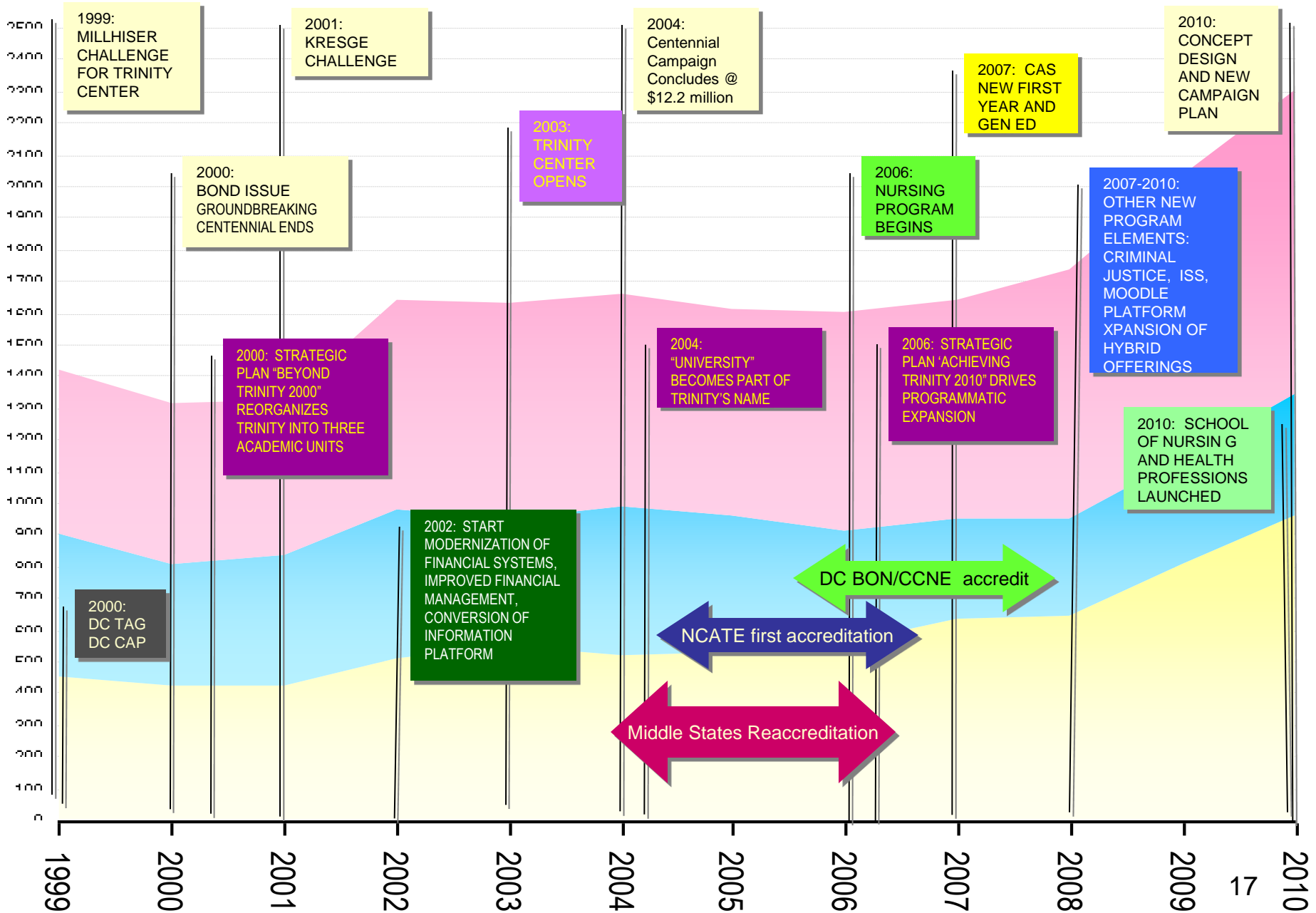
FALL ENROLLMENT HEADCOUNTS SINCE FALL 2001

NUMBER OF STUDENTS



How did Trinity achieve 100% growth over the last decade?

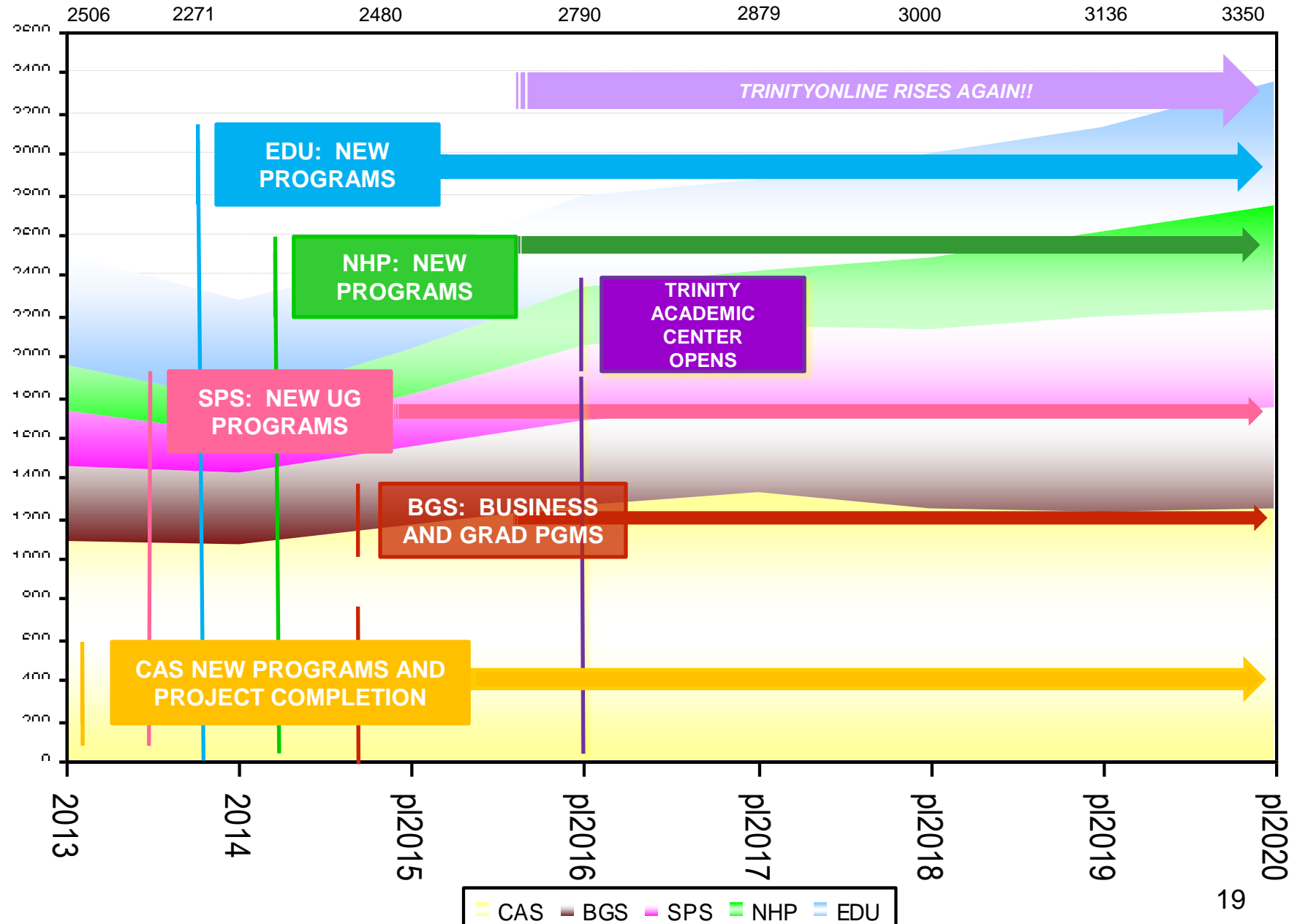
KEY FACTORS SUPPORTING TRINITY'S GROWTH SINCE 1999



What does the map for growth
include for the next seven
years?

ENROLLMENT GROWTH DRIVERS 2013-2020

TOTAL HEADCOUNT



Enrollment: Assumptions, Risks

Assumptions

- Retention improvement 2-5 % pts in each sector thru:
 - Focus on strategic retention management, including implementation of case management approach
 - Improved academic advising
 - Improved learning skills support
 - Improved services
 - Stronger financial supports including pricing strategies, incentives for completion
- Admissions meets goals
- Strategic academic program initiatives implemented on time
- Trinity academic center opens by 2016
 - Successful capital campaign
 - Financing secured
 - Construction proceeds on time

Risks

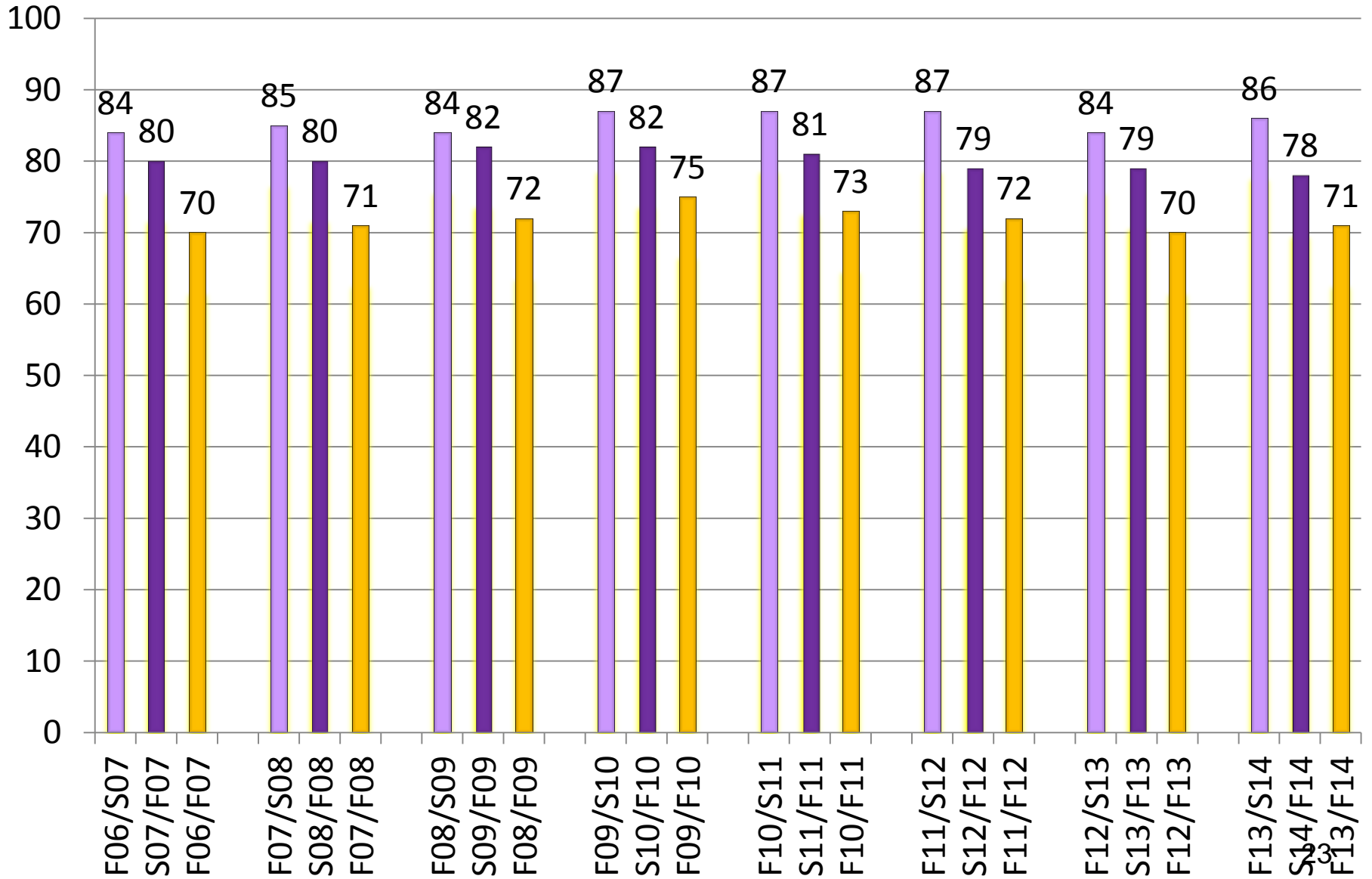
- Attrition gets worse due to:
 - Student dissatisfaction
 - New competition
 - Financial conditions
 - Academic failures
 - Major reputational disaster
- Admissions fails to meet goals
- Capital Campaign Fails
- Academic Center Delayed
- Strategic innovation stalls while the rest of the market moves faster
- DC TAG and related DC sources of student support disappear
- Major changes to federal financial aid availability, regulations
- Nursing fails to improve NCLEX scores and DCBON takes debilitating action

Enrollment Goals: Retention and Completion

Fall-to-Fall Retention Rates Fall 2007 to Fall 2014									GOALS		
F-F:	2007	2008	2009	2010	2011	2012	2013	2014	2014	2015	2016
Total	70%	71%	72%	75%	73%	72%	70%	71%	75%	78%	80%
CAS	68%	67%	72%	76%	73%	71%	69%	70%	75%	78%	80%
SPS UG	67%	73%	71%	73%	68%	66%	64%	69%	70%	72%	75%
BGS	73%	80%	76%	77%	76%	76%	74%	82%	80%	82%	85%
EDU	73%	73%	68%	75%	74%	74%	74%	72%	80%	82%	85%
NHP					94%	85%	77%	78%	88%	90%	92%

2006-2014 Retention Rates Total Enrollment

Fall-Spring, Spring-Fall, Fall-Fall



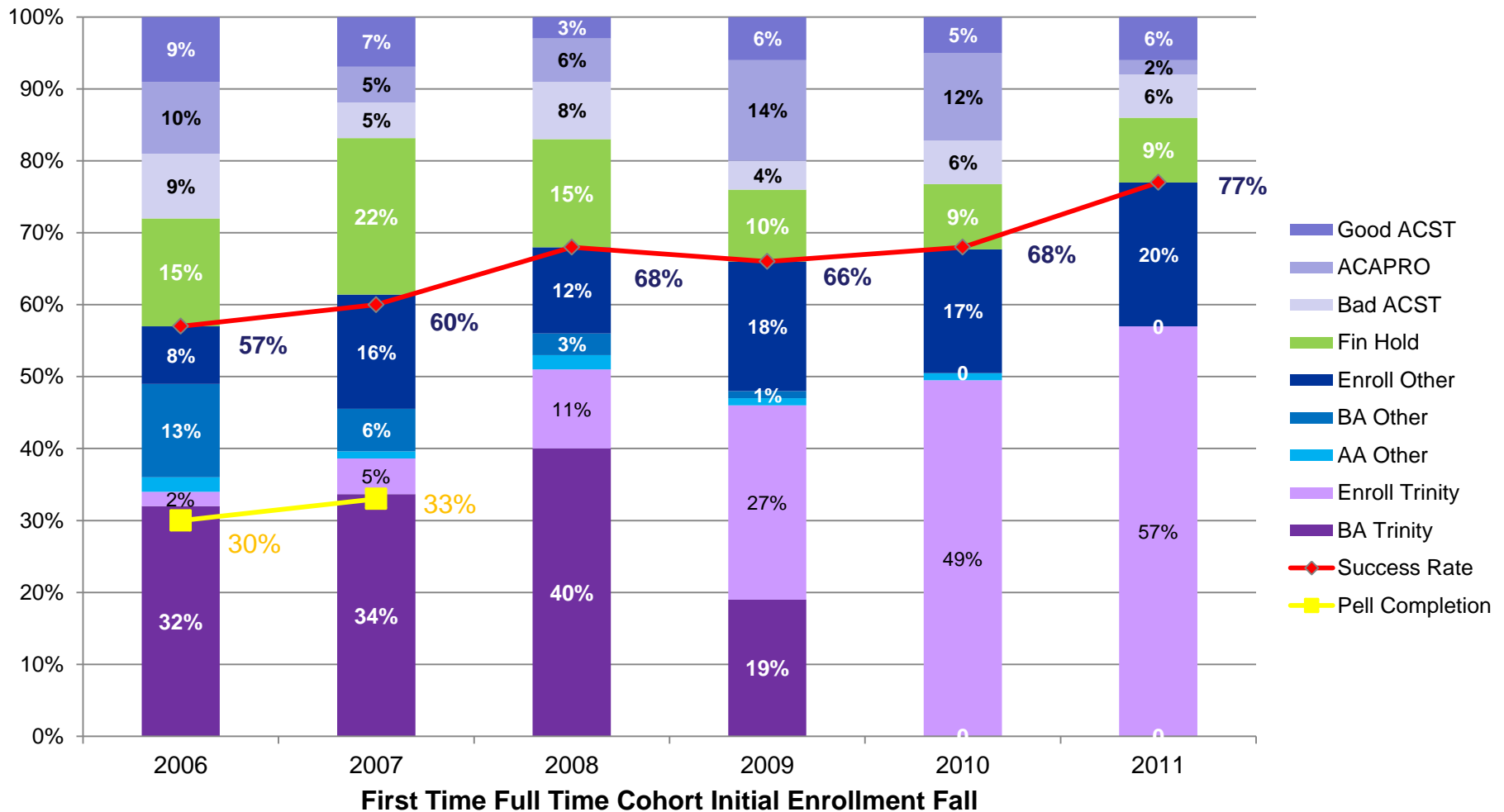
Trinity Full-Time First-Time Cohort Completion and Continuing Enrollment/Attrition at Trinity or Elsewhere with Clearinghouse Data

Time since starting: Starting Cohort Fall Semester:	7 yrs		6 yrs		5 yrs		4 yrs		3 yrs		2 yrs	
	2006	2006	2007	2007	2008	2008	2009	2009	2010	2010	2011	2011
	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Earned AA at another inst	3	2%	1	1%	3	2%	2	1%	2	1%	0	0%
Earned BA at another inst	23	13%	13	6%	6	3%	2	1%	0	0%	0	0%
Earned Cert at another insti	0	0%	0	0%	1	0%	1	0%	2	0%	0	0%
Earned BA at Trinity (~ IPEDS GRAD RATE)	55	32%	75	34%	78	40%	45	19%	1	0%	0	0%
Still Enrolled at another Inst	14	8%	35	16%	24	12%	43	18%	46	17%	52	20%
Still Enrolled at Trinity	4	2%	10	5%	21	11%	65	27%	132	49%	150	57%
Financial Hold	27	15%	48	22%	30	15%	25	10%	23	9%	24	9%
Left not in good academic standing	16	9%	12	5%	16	8%	9	4%	16	6%	15	6%
Left on academic probation	17	10%	12	5%	12	6%	33	14%	32	12%	5	2%
Left in good standing	15	9%	16	7%	6	3%	15	6%	14	5%	17	6%
TOTAL	174	100%	221	100%	197	100%	240	100%	268	99%	263	100%

	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Still Enrolled or Graduated ALL	99	57%	134	60%	133	68%	158	66%	183	68%	202	77%

	2006	2006	2007	2007	2008	2008	2009	2009	2010	2010	2011	2011
Top Transfer Schools:	UMUC		UDC		UDC		MCC		UDC		UDC	
	UMCP		UMCP		PG		UDC		MCC		MCC	
	UDC		PGCC		Bowie		Bowie		UMCP		UMCP	
	Howard		MCC		Howard		PGCC		CSoMd			
			Strayer									

Trinity Cohort Completion and Continuing Enrollment/Attrition With Clearinghouse Data for Cohorts from Fall 2006 to Fall 2011 And Pell Grant Completion Rates for 2006 and 2007 Cohorts

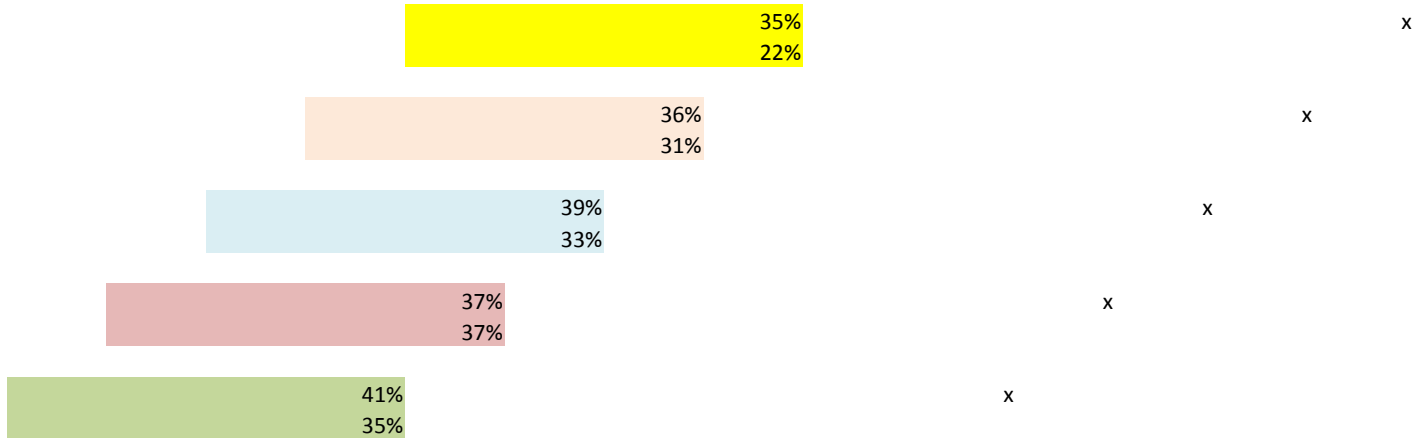


On the columns above, the dark purple is the completion rate at Trinity, the light purple is still enrolled at Trinity, the blues are completed or still enrolled at other institutions, and the red line and number is the “success rate.” The cohorts that began in 2006-2007-2008 have largely finished degrees by now. The cohorts for 2009-2010-2011 are mostly still in school. Above the line, the columns show attrition because of money (green) or academic reasons.

TRINITY IPEDS GRADUATION RATE AND TRANSFER COUNTS AND RATES 2000-2013
 "Student Right to Know" Rates

<i>Cohort Start Year</i>	REPORTING YEARS														
	2000	2001	2002	2003	2004	2005	2006	2007	Total 2000 to 2007	2008	2009	2010	2011	2012	2013
FTFT Enrolled	102	116	174	156	144	124	174	221	1211						
6 Yr Graduated	53	42	69	59	50	56	53	75	457						
Rate	52%	36%	40%	38%	35%	45%	30%	34%	38%						

Four Year Grad
 Four Year Transfer

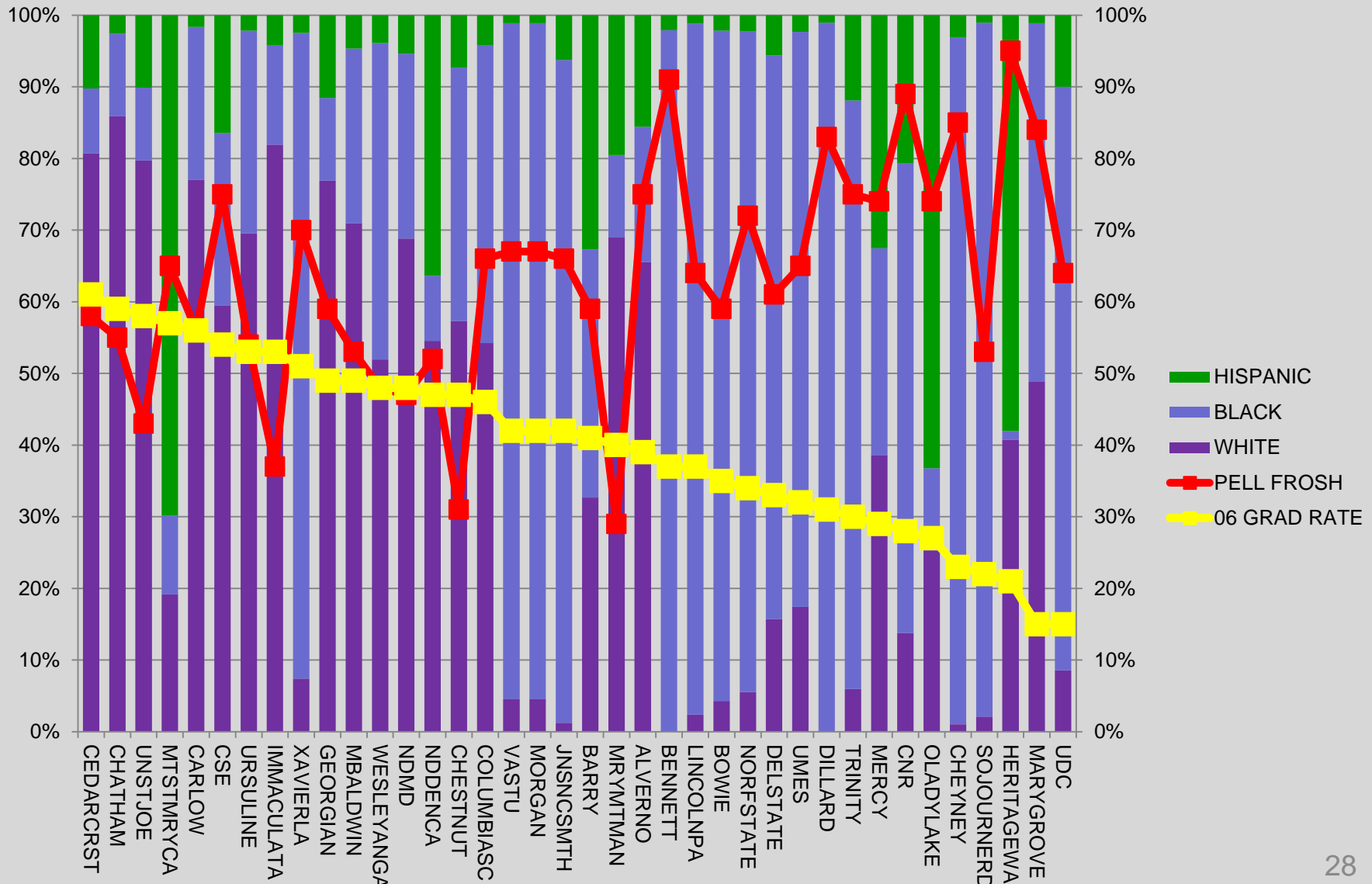


INSTITUTION	HCT	WOMEN	WHITE	BLACK	HISPANIC	B+H	PELL FROSH	06 GRAD RATE	TUITION	Women's C.	Catholi c C.	HBCU
CHEYNEY	1433	52%	1%	93%	3%	96%	85%	23%	8,802			XP
BENNETT	793	100%	0%	94%	2%	96%	91%	37%	16,974	X		X
DILLARD	1447	72%	0%	93%	1%	94%	83%	31%	1,477			X
SOJOURNERD	1916	88%	2%	92%	1%	93%	53%	22%	7,920			X
BOWIE	6430	64%	4%	87%	2%	89%	59%	35%	6,600			XP
NORFSTATE	8318	66%	5%	83%	2%	85%	72%	34%	6,860			XP
VASTU	6757	61%	4%	83%	1%	84%	67%	42%	7,420			XP
MORGAN	9027	61%	4%	83%	1%	84%	67%	42%	7,420			XP
LINCOLNPA	2393	61%	2%	80%	1%	81%	64%	37%	9,590			X
JNSNCSMTH	1886	61%	1%	74%	5%	79%	66%	42%	18,326			X
TRINITY	3103	91%	5%	69%	10%	79%	75%	30%	21,125	X	X	
DELSTATE	4406	63%	14%	70%	5%	75%	61%	33%	7,336			XP
XAVIERLA	3875	71%	6%	73%	2%	75%	70%	51%	18,700			X
UMES	5064	58%	15%	69%	2%	71%	65%	32%	6,713			XP
OLADYLAKE	2870	73%	22%	10%	55%	65%	74%	27%	23,420		X	
UDC	11000	62%	6%	57%	7%	64%	64%	15%	7,244			XP
MTSTMRYCA	3205	90%	14%	8%	51%	59%	65%	57%	32,894	X	x	
MERCY	15786	72%	32%	24%	27%	51%	74%	29%	17,556	XX	xx	
CNR	5886	90%	8%	38%	12%	50%	89%	28%	30,380	X	x	
HERITAGEWA	1447	75%	33%	1%	47%	48%	95%	21%	16,500			
MARYGROVE	3345	76%	44%	45%	1%	46%	84%	15%	18,900	XX	x	
COLUMBIASC	1495	96%	51%	39%	4%	43%	66%	46%	22,030	X		
WESLEYANGA	839	96%	40%	34%	3%	37%	48%	48%	19,000	X		
BARRY	10673	66%	17%	18%	17%	35%	59%	41%	28,160	XX	x	
CHESTNUT	2621	73%	47%	29%	6%	35%	31%	47%	30,165	XX	x	
CSE	2047	89%	47%	19%	13%	32%	75%	54%	29,900	X	x	
ALVERNO	2919	98%	59%	17%	14%	31%	75%	39%	22,126	X	x	
NDDENCA	2368	69%	36%	6%	24%	30%	52%	47%	30,500		x	
NDMD	3887	87%	64%	24%	5%	29%	47%	48%	34,850	X	x	
URSULINE	1866	88%	64%	26%	2%	28%	54%	53%	25,790	X	x	
MRYMTMAN	2212	78%	60%	10%	17%	27%	29%	40%	25,648	XX	xx	
MBALDWIN	2226	93%	61%	21%	4%	25%	53%	49%	28,020	X		
GEORGIAN	3000	87%	60%	9%	9%	18%	59%	49%	28,040	XX	x	
IMMACULATA	5418	77%	77%	13%	4%	17%	37%	53%	29,000	XX	x	
CEDARCRST	2043	94%	71%	8%	9%	17%	58%	61%	31,596	X		
UNSTJOE	3228	91%	55%	7%	7%	14%	43%	58%	31,826	X	x	
CARLOW	3453	84%	47%	13%	1%	14%	56%	56%	24,438	X	x	
CHATHAM	2676	87%	67%	9%	2%	11%	55%	59%	31,352	X		

XX=historic women's or Catholic college

XP=Public HBCU

Chart One: Select Cohort Sorted first by IPEDS Grad Rate for Fall 2006 Cohort then showing Pell Frosh and and Enrollment of White/Black/Hispanic Students



Strategic Goal 3: Strategic Program Initiatives

The following slides present details of the strategic program initiatives in each academic unit

College of Arts and Sciences

Strategic Initiatives

- Strategies to Improve First-to-Second Year Retention with Revised First Year Experience
 1. Revise First Year Curriculum
 2. Improve First Year Academic Support
 3. Enhance Faculty Development: Pedagogy for Student Success
- Success in the Sciences: Undergraduate Research Opportunities
- International Affairs: Expand Study Abroad Opportunities and Related Initiatives

NHP Strategic Initiatives

- Master of Science : Occupational Therapy
- Master of Science in Nursing
- Articulation Agreements
- Dual degree Programs

School of Professional Studies

Strategic Initiatives

- **Early Childhood Education**
 - Outside Grant/Scholarship Funding
 - Community College Articulation
 - Partnerships: Martha's Table, Mary's Center
- **Business Administration**
 - Partnerships: DCHR, Hotel Assn., BIG, etc.
 - Community College Articulation
- **Psychology:** Major Added
- **Health Sciences:** Link to OTA for BA/BS pathway into advanced health degrees

School of Business and Graduate Studies
Strategic Initiatives

- New Program in Strategic Communication and Media Studies
- Reform of the MBA Program
- Reform of the Master's in International Security Studies
- Refocus MSA Program
- Improved Career Services for Graduate Students

School of Education Strategic Initiatives

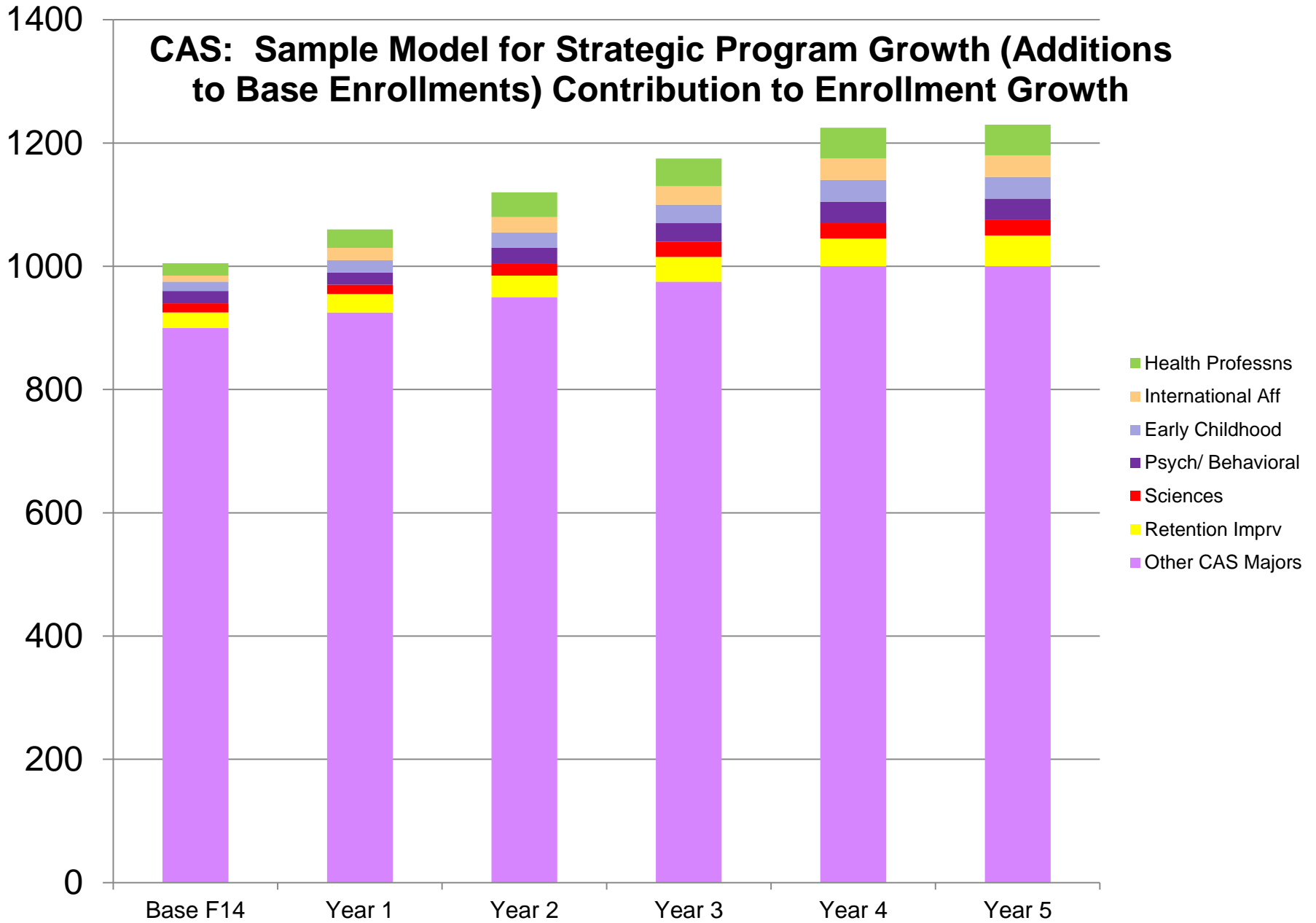
- Early Childhood Education
- CACREP Accreditation for Master's in Counseling Program
- Master's in Educational Policy
- Review and Redesign of Secondary Education Programs
- Teacher Education Assessment

The following graphs are simply models showing how relatively modest achievement in the strategic program initiatives can build on top of relatively stable steady-state baseline enrollment in each unit. The initiatives do not replace existing enrollments but add to them.

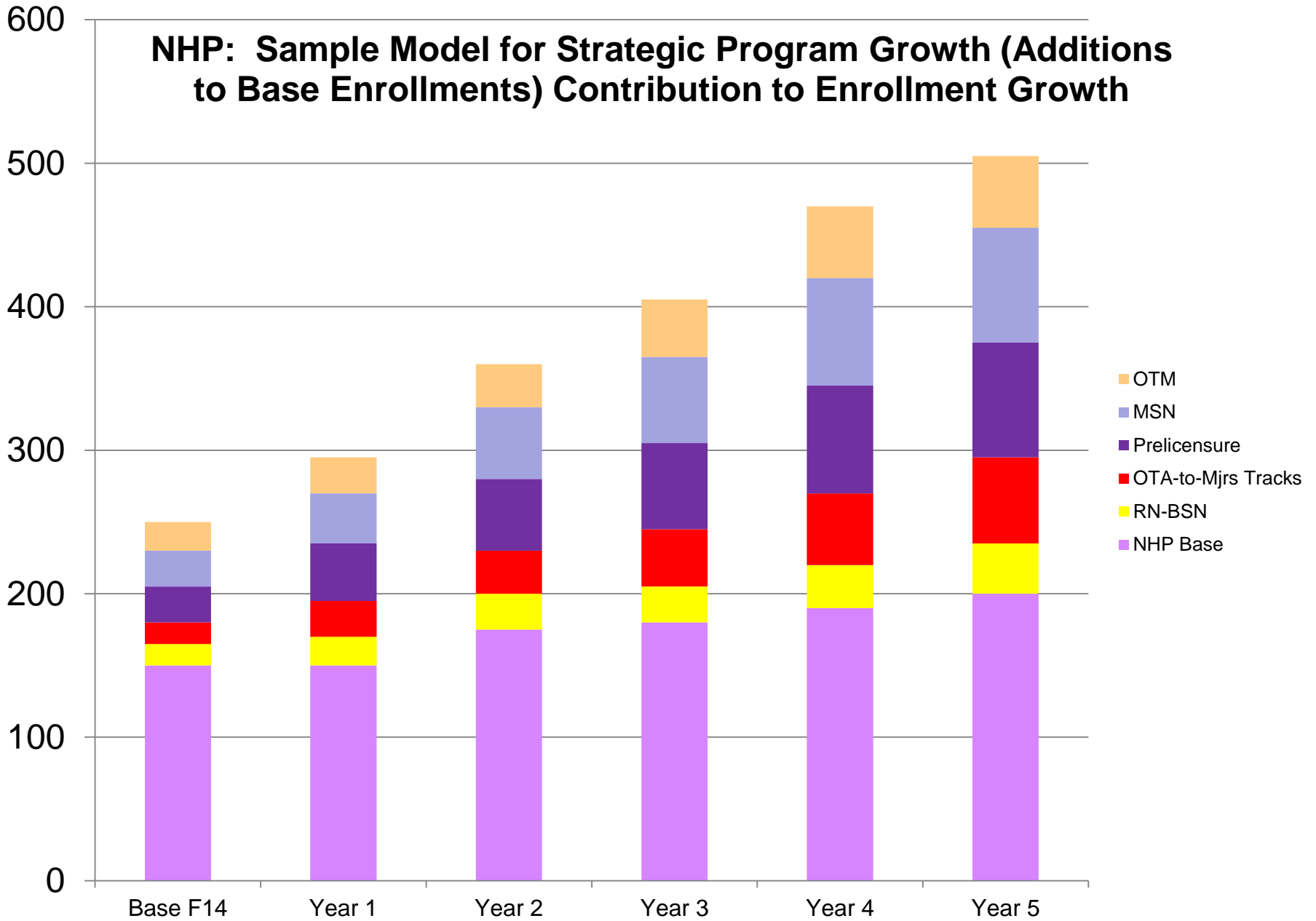
Unlike the earlier enrollment model (Slide 38) which is somewhat more precise, the following models do not present precise goals but rather show estimates of possible growth in fields that have growth potential.

The academic deans are engaged in very detailed planning processes that test the assumptions of the models and plan the actual launch timetables for the new and revised programs.

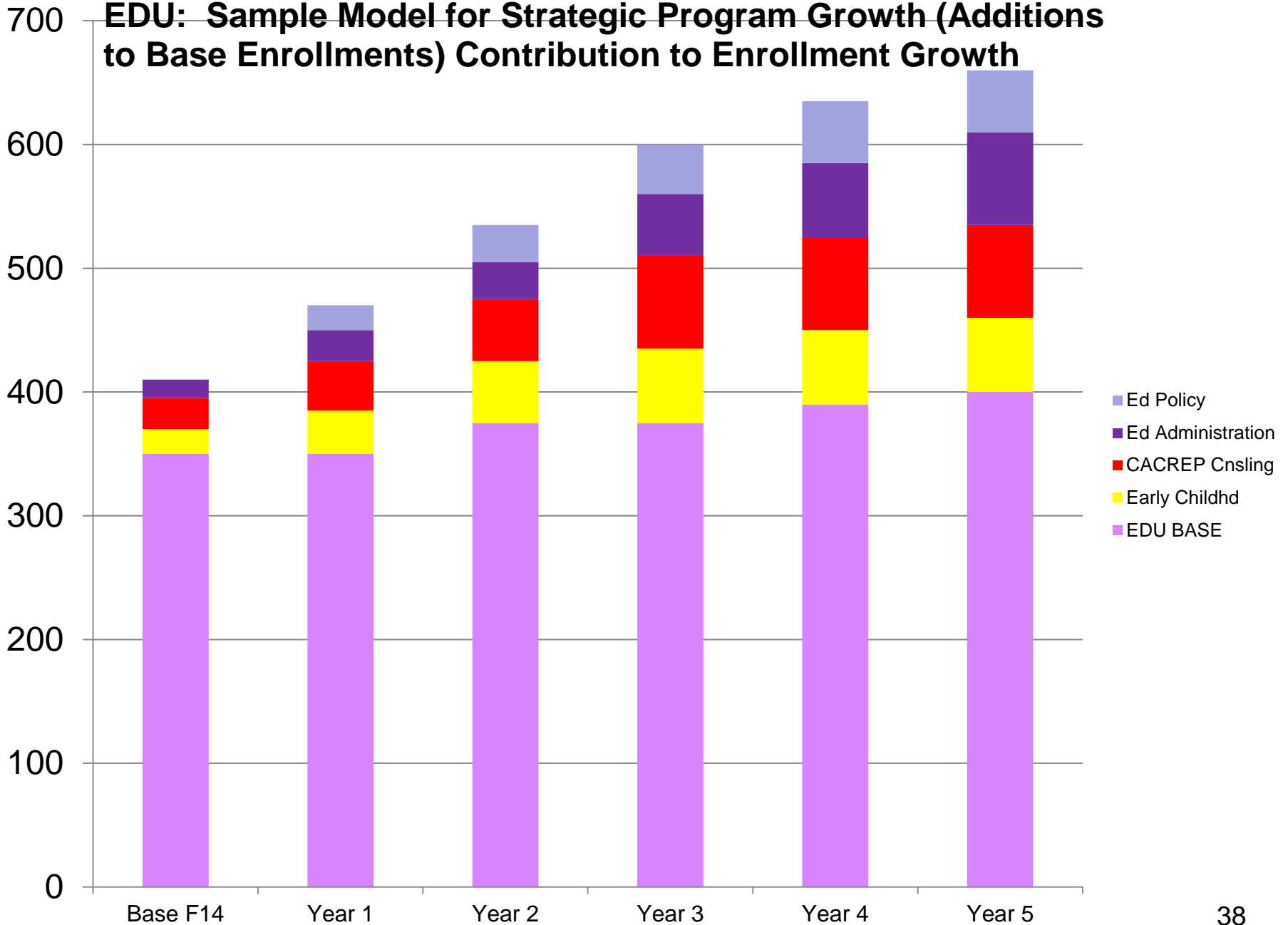
CAS: Sample Model for Strategic Program Growth (Additions to Base Enrollments) Contribution to Enrollment Growth



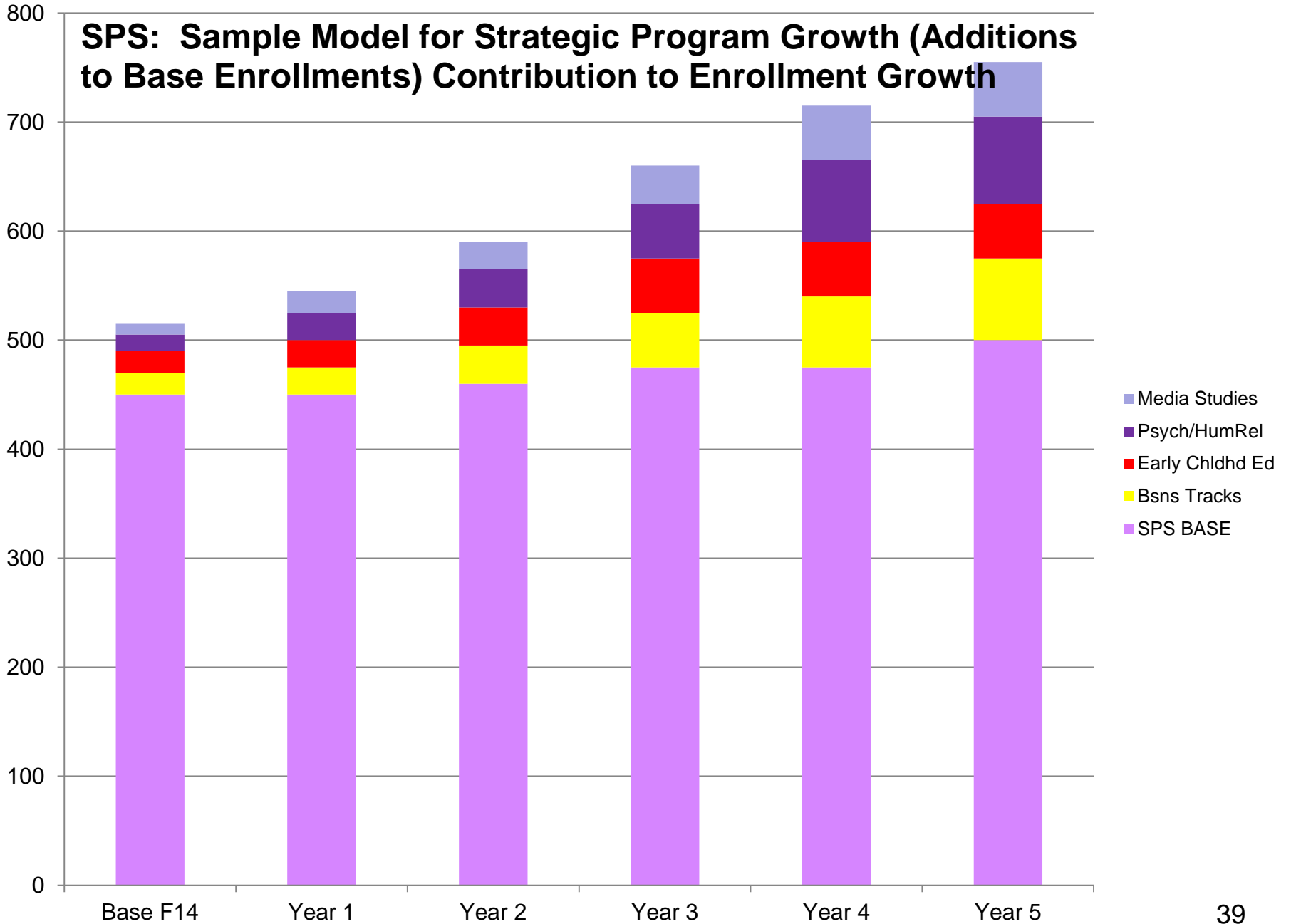
NHP: Sample Model for Strategic Program Growth (Additions to Base Enrollments) Contribution to Enrollment Growth



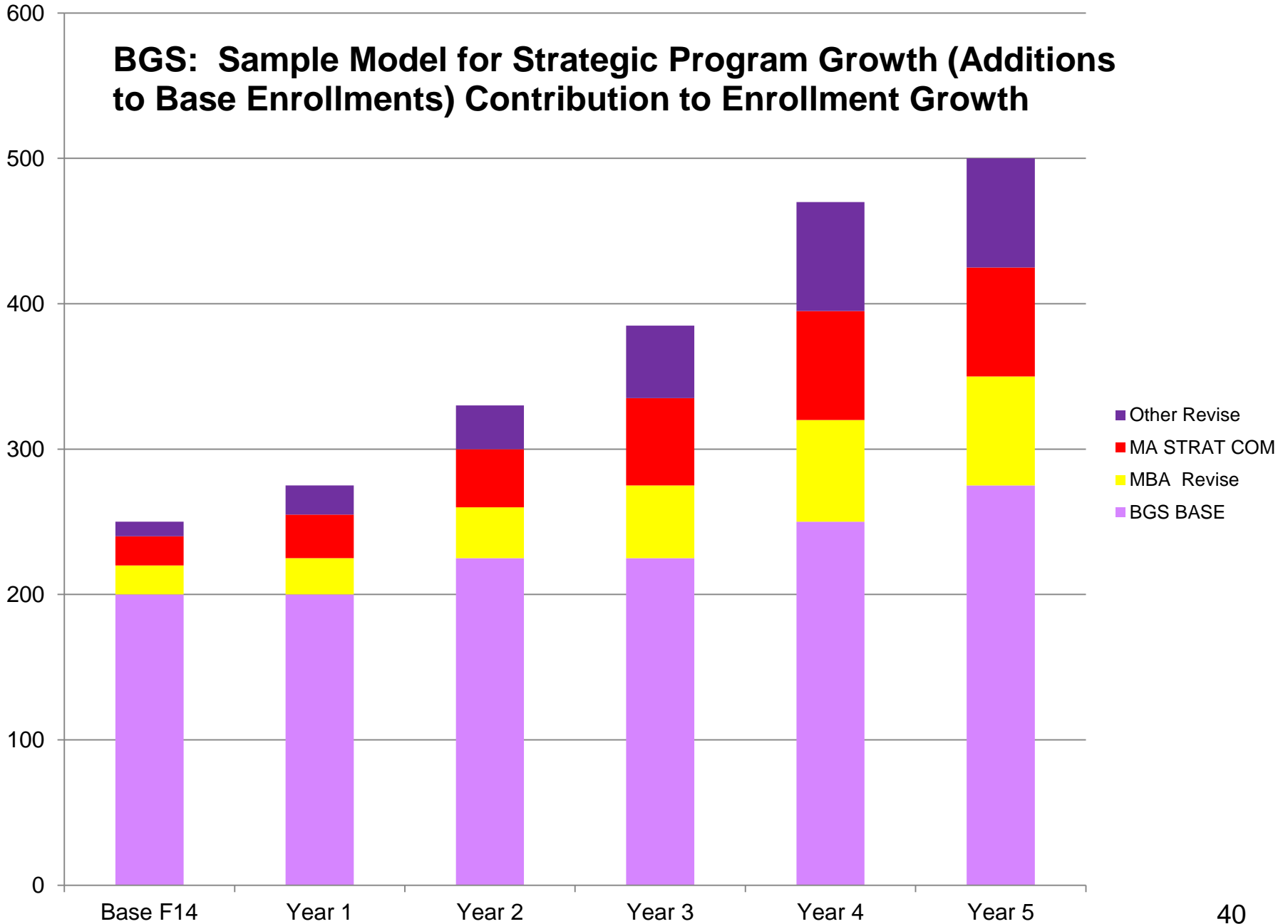
EDU: Sample Model for Strategic Program Growth (Additions to Base Enrollments) Contribution to Enrollment Growth



SPS: Sample Model for Strategic Program Growth (Additions to Base Enrollments) Contribution to Enrollment Growth



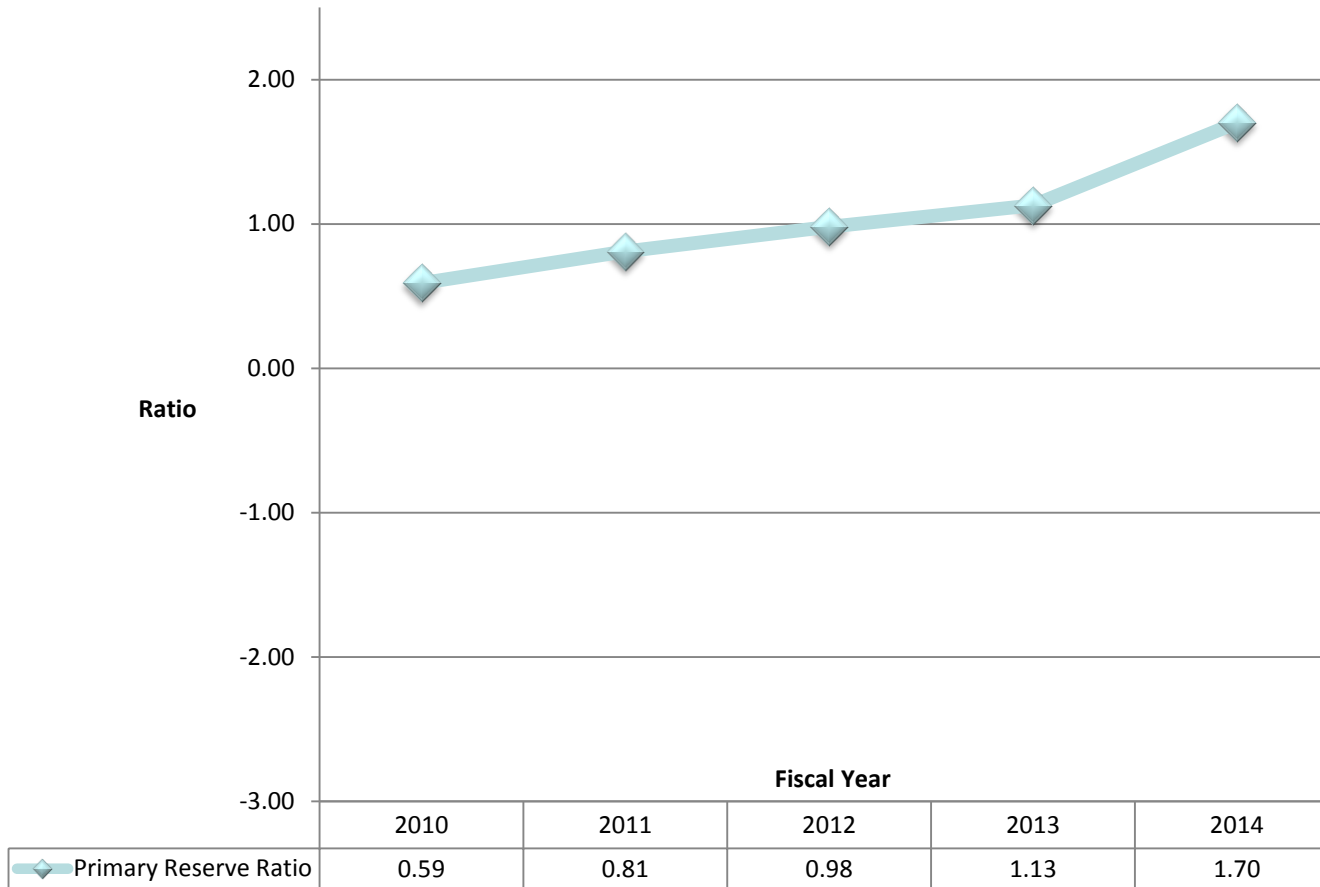
BGS: Sample Model for Strategic Program Growth (Additions to Base Enrollments) Contribution to Enrollment Growth



Strategic Goal 2: Finances

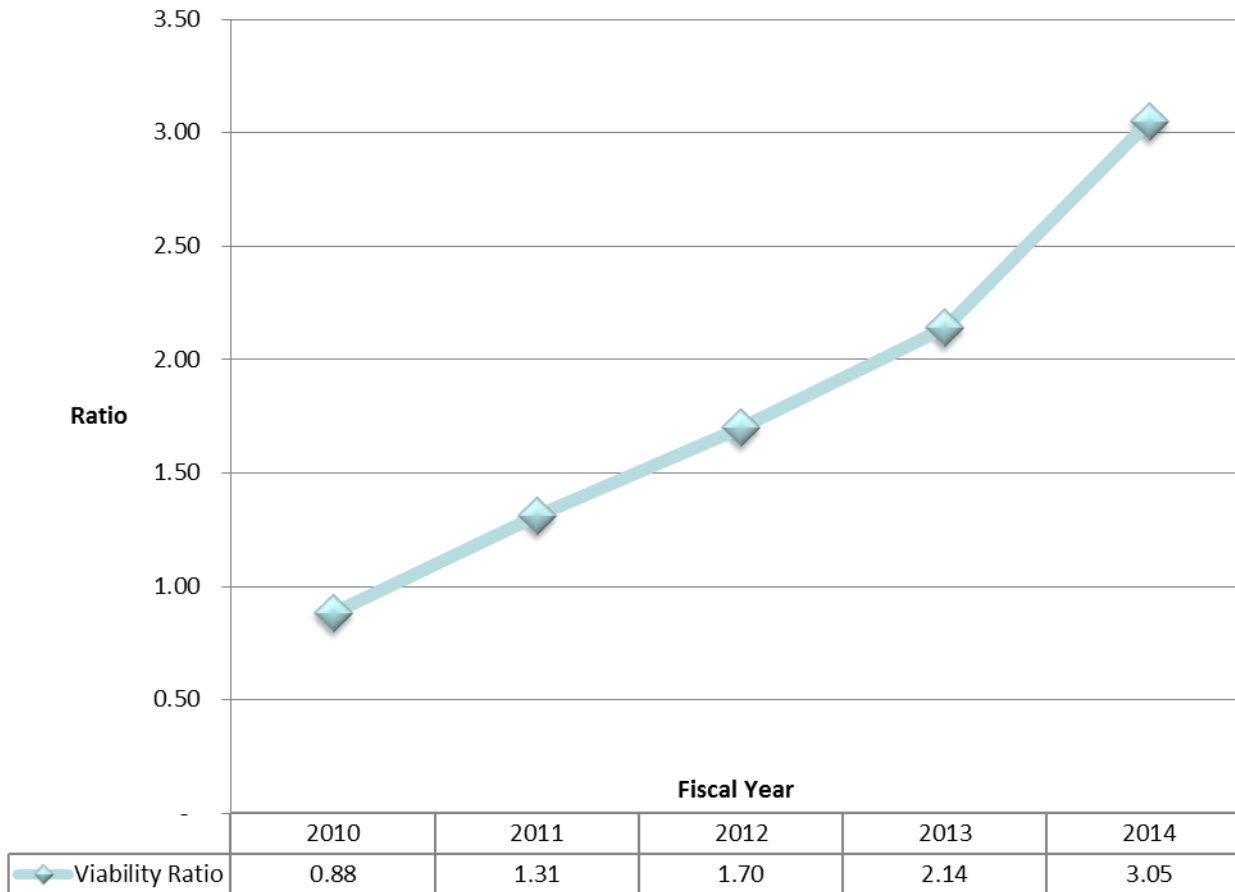
The following slides include the strategic financial ratios that are the basis for Trinity's financial plan

Trinity -- Primary Reserve Ratio



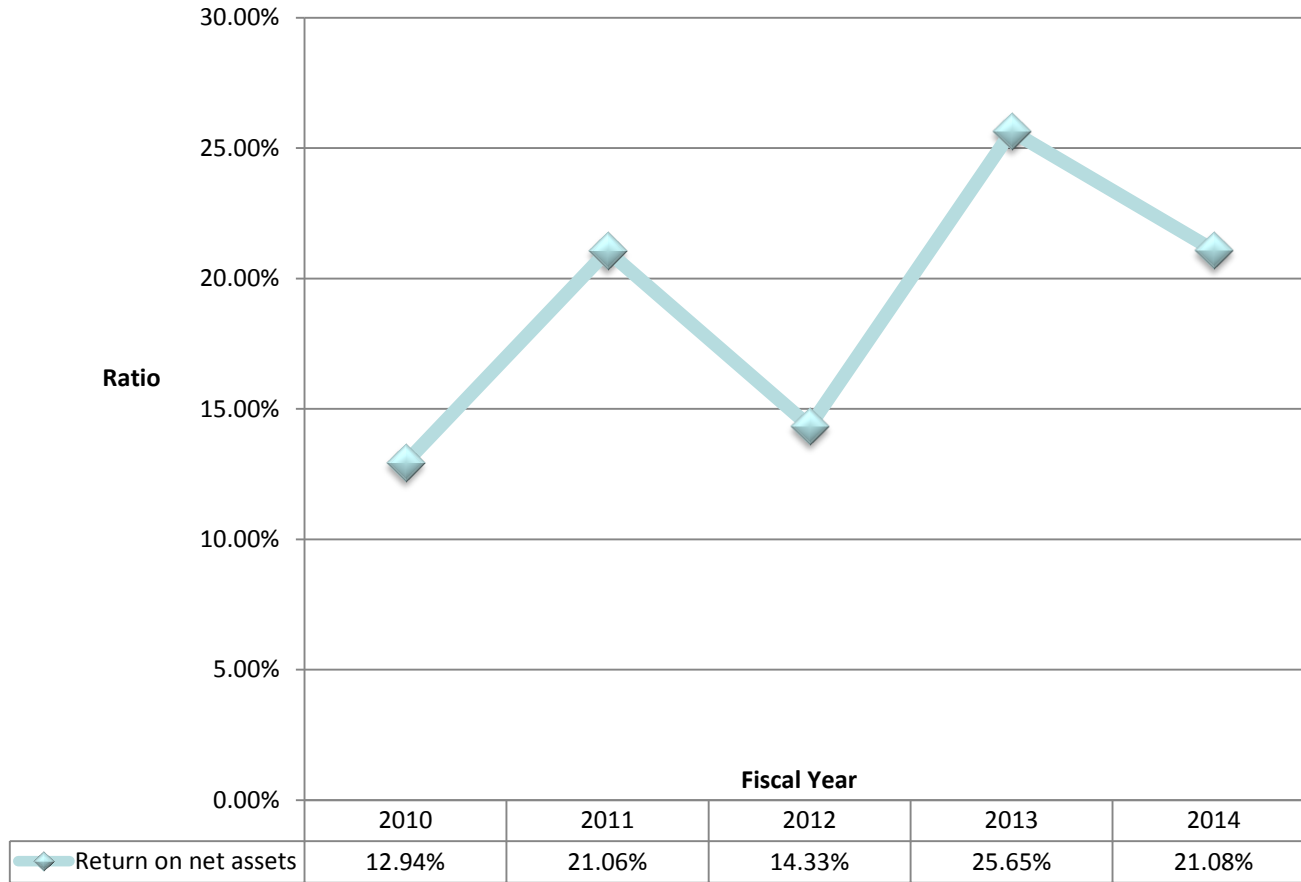
- Measures how long the institution could operate on expendable net assets without relying on additional net assets generated by operations.
- A primary reserve ratio of .40x would represent moderate financial health.

Trinity -- Viability Ratio



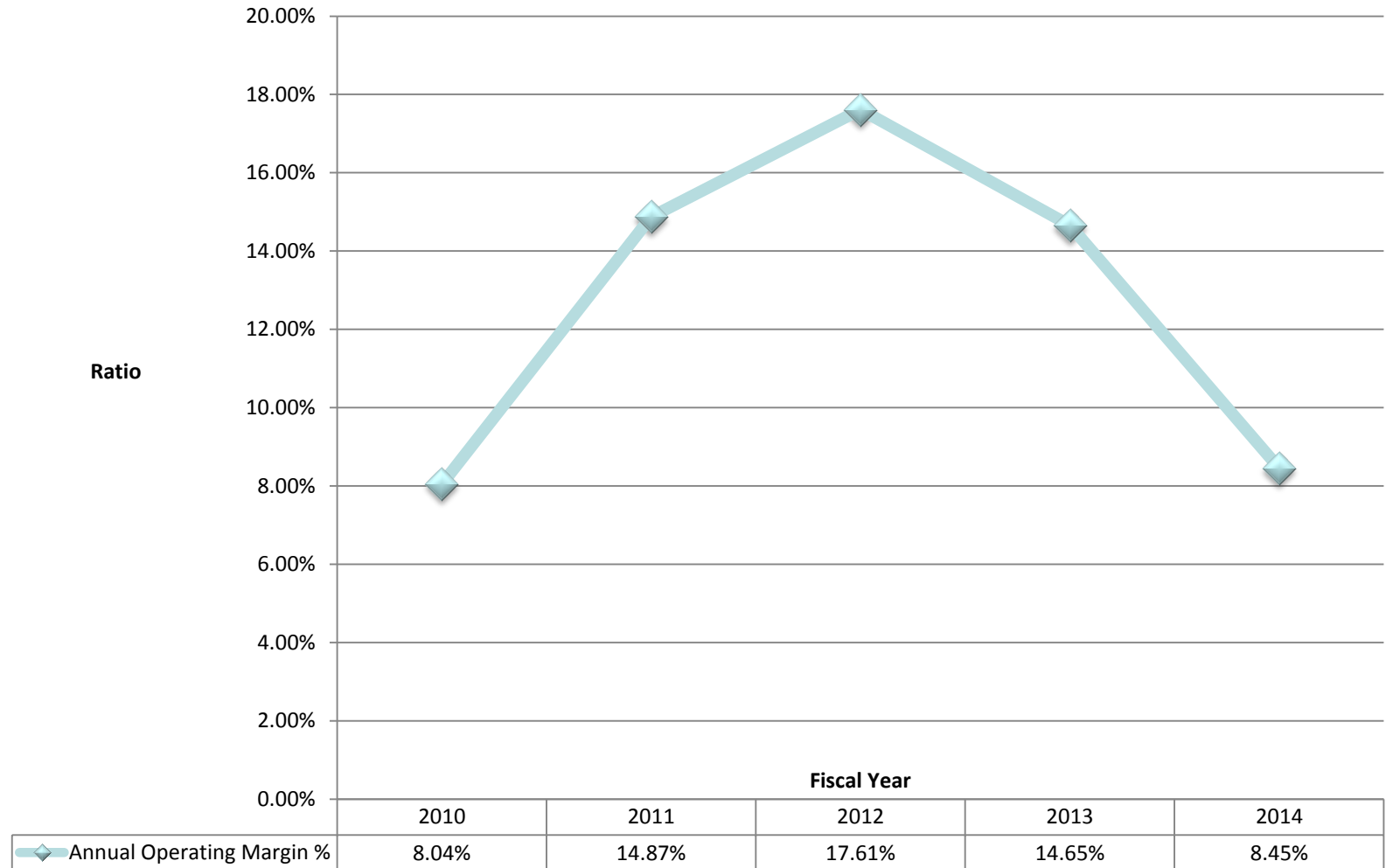
- Viability Ratio measures the availability of expendable net assets to cover debt should the institution need to settle its obligations as of the balance sheet date.
- A ratio of 1.0 or > indicates that an institution has enough expendable net assets to cover its debt obligations.

Trinity -- Return on Net Assets



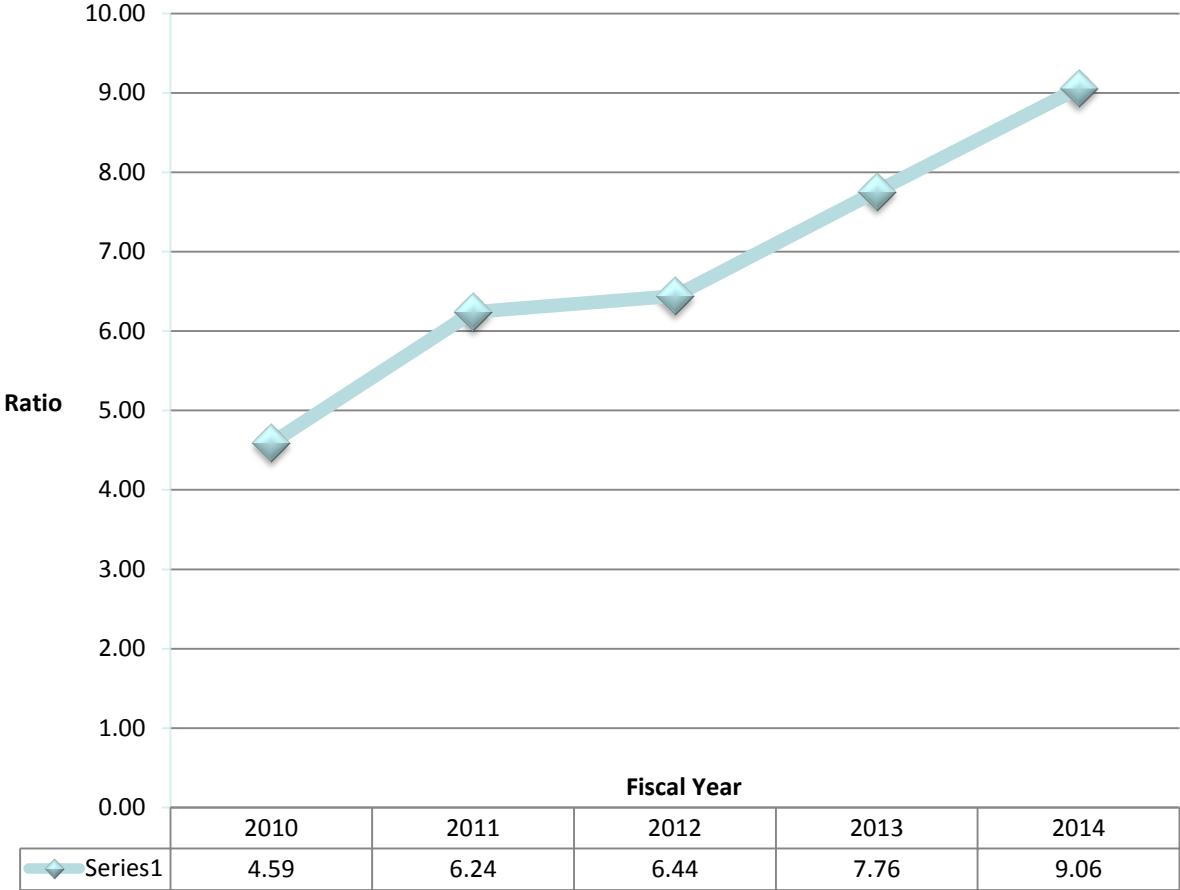
- Return on Net Assets measures the change in net assets that occurred as a result of the operations of the institution.
- The Return on Net Assets should be positive and have an improving trend.

Trinity -- Annual Operating Margin



- Annual Operating Margin measures the extent to which current-year internally generated resources have contributed to the overall financing of the institution's operations.
- The Annual Operating Margin should be positive and have an improving trend.

Trinity -- Composite Financial Index

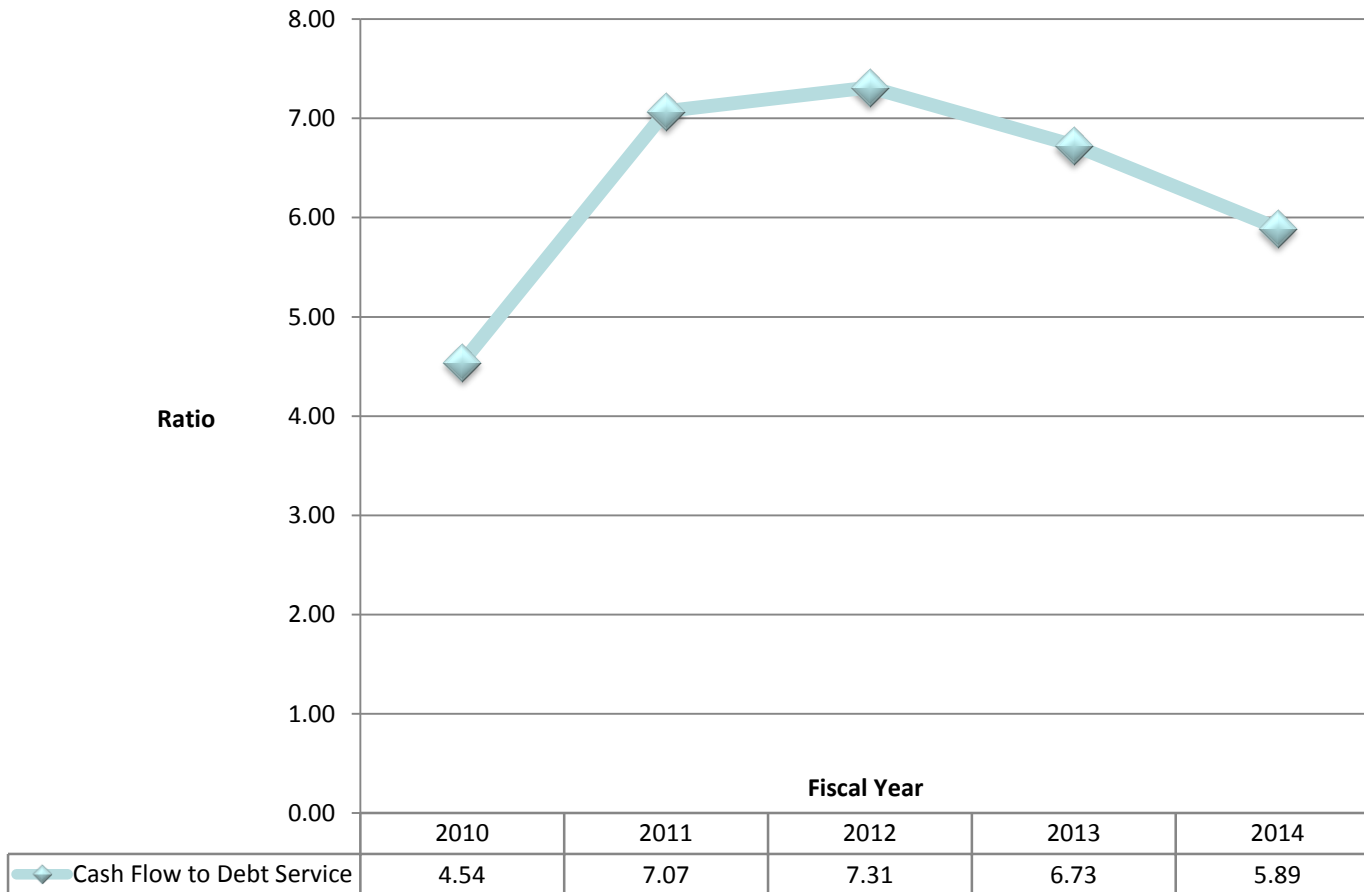


- Are resources sufficient and flexible enough to support the mission? – Primary Reserve Ratio
- Are debt resources managed strategically to advance the mission? – Viability Ratio
- Does asset performance and management support the strategic direction? – Return on Net Assets Ratio
- Do operating results indicate the institution is living within available resources? – Annual Operating Margin (Net Operating Revenues Ratio)

CFI SCORING GUIDE

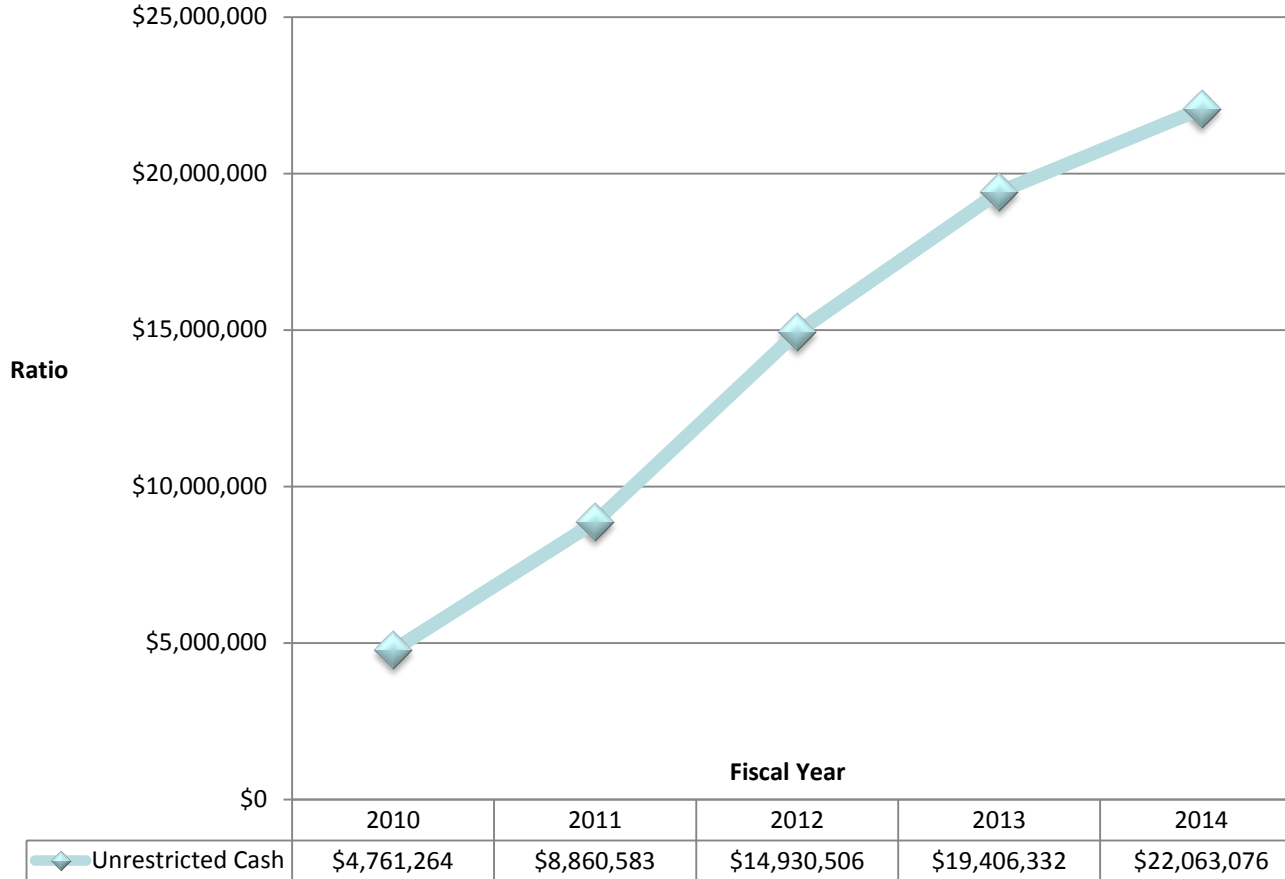
SCALE LEVEL	CFI SCORING RANGE	ACTION
One	-1 to 1	Assess viability of institution's survival
Two	0 to 2	Reengineer the institution
Three	1 to 3	
Four	2 to 4	Direct resources toward transformation
Five	3 to 5	
Six	4 to 6	Focus resources to compete
Seven	5 to 7	
Eight	6 to 8	Experiment with new initiatives
Nine	7 to 9	Experiment with new initiatives; achieve a robust mission
Ten	> 9	Deploy resources to achieve a robust mission

Trinity -- Cash Flow to Debt Service Ratio



- Measures actual margin of protection for annual debt service payments from annual operations.
- Agreement requires that Trinity maintain a minimum ratio of 1.10:1.00 for fiscal years ending June 30, 2014 through June 30, 2016, and 1.25:1.00 thereafter.

Trinity -- Unencumbered Unrestricted Liquidity



- Agreement requires Trinity maintain a minimum balance of unrestricted cash of \$11,000,000, as of the end of the second and fourth fiscal quarters for fiscal years ending June 30, 2014 through June 30, 2016, and \$15,000,000 thereafter.
- Unrestricted cash represents reserves that are available for any purpose immediately.

Results

- Highly capitalized.
- Financially flexible.
- Is living within available resources.
- In a position to deploy resources to achieve a robust mission.
- University meets debt covenants.

Additional data sets and assessments supporting the strategic goals are located in the annual departmental reports available on the Trinity Self-Study website.