

BOARD OF TRUSTEES
MEETING MINUTES
JUNE 6, 2018

CONSENT AGENDA APPROVED MINUTES:

Board of Trustee Meeting: April 11, 2018 (posted and filed separately)

Finance and Facilities: May 23, 2018

Institutional Advancement, Marketing & Communications: May 23, 2018

Risk Management & Audit: May 23, 2018

Risk Management & Audit Executive Session: May 23, 2018

Academic Affairs: May 23, 2018

Executive: May 23, 2018

Nominations: May 23, 2018

BOARD OF TRUSTEES

June 6, 2018

PRESENT: Trustees Mattera (chair), Chisholm, Contreras, DeSimone, Katzman, Lutts, Murphy, Russell, Veira and Trustee Scott (participated by phone) Also participating at the meeting were President Keenan and Board Secretary Montague and Assistant Secretary Sadowski.

ABSENT: Zahlaway Belsito

The provisions of General Laws, Chapter 30A, having been complied with and a quorum of the Board being present, the Board of Trustees of Salem State University held a regular meeting in Marsh Hall, Room 210, Central Campus, Loring Avenue, Salem, Massachusetts, on June 6, 2018 with Paul Mattera, Chair, presiding.

Note - In accordance with the Open Meeting Law all meeting votes are by roll call when there is remote participation.

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I. CALL TO ORDER - Chair Mattera called the meeting to order at 5:07 pm. The Chair announced that all votes would be taken via roll call in accordance with the Open Meeting Law.

II. CONSENT AGENDA - Chair Mattera read the items contained on the Consent Agenda and asked for any objections or modifications to the minutes. Hearing none, he called for a motion to approve the minutes and upon a motion duly made by Trustee DeSimone and seconded by Trustee Chisholm, upon a roll call vote it was unanimously

VOTED: To approve the Consent Agenda of June 6, 2018 (CA-17-05).

Voting in the affirmative: Chisholm, Contreras, DeSimone, Katzman, Lutts, Murphy, Russell, Scott, Veira Mattera (chair)

Voting in the negative: None

Absent: Zahlaway Belsito

Consent Agenda

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III. COMMITTEE ACTIONS

Finance and Facilities: Trustee Katzman announced that all of the committee’s motions would be read and then one vote would be taken. Trustee Katzman introduced the first motion regarding the university’s investment management services contract renewal:

Finance & Facilities:

VOTED: The Board of Trustees of Salem State University hereby approves the reappointment of Eastern Bank Wealth Management to provide investment management services for certain Salem State University trust funds and authorizes the administration of the university to renew the contract for one year beginning December 16, 2018.

Reappoint Eastern Bank Wealth Mgmt

The resolution is effective upon its approval (FF-17-04).

Trustee Veira presented the committee’s second motion regarding undergraduate fees for FY19:

VOTED: The Board of Trustees of Salem State University hereby approves the fees as shown in the attached tuition and fee rate schedule (Appendix IV). The new rates shall be effective for the 2018-19 academic year (FY2019). The president and other officers of the university are hereby authorized to do all things and take all actions deemed necessary to implement this decision (FF-17-05).

Fees AY
2018-19

Trustee Russell presented the committee’s third motion which pertained to the FY19 All Funds Budget:

VOTED: The Board of Trustees of Salem State University hereby approves the Fiscal Year 2019 All Funds Budget as recommended by the president and as shown in the attached FY2019 Salem State University All Funds Budget at the level of \$172.3 million in Managed Expenses. This action includes approval of the FY2019 Trust Fund Budgets and the Contracts Exceeding \$500,000 each as included in the budget package. The president and other officers of the university are hereby authorized to do all things and take all actions deemed necessary to implement this decision (FF-17-06)

FY2019
All Funds
Budget

Hearing no discussion Trustee Katzman asked if there was a second and Trustee Lutts duly seconded the motions. Upon a roll call vote it was unanimously,

VOTED: Voting in the affirmative: Chisholm, Contreras, DeSimone, Katzman, Lutts, Murphy, Russell, Scott, Veira, Mattera (chair)
Voting in the negative: None
Absent: Zahlaway Belsito

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As it is the chair’s prerogative to take agenda items out of order Chair Mattera announced Trustee Emeritus would be the next item for discussion.

Executive: Chair Mattera reminded the trustees that the Trustee Emeritus motion was unanimously approved by the Executive Committee and did not require full Board approval however as it is an important matter it should be brought before the full Board. The Trustee Emeritus position was developed and discussed with Jacob Segal in mind. His contributions to the Board and to the university are exemplary. President Keenan echoed the chair’s accolades and thought it fitting that Jacob should serve as the inaugural Trustee Emeritus.

Chair Mattera hearing no further discussion, asked for a second and Trustee Murphy duly seconded the motion. Upon a roll call vote it was unanimously,

Executive:

VOTED: The Board of Trustees affirms the nomination of Jacob Segal as Trustee Emeritus (EX-17-02).

Trustee
Emeritus
Jacob
Segal

Voting in the affirmative: Chisholm, Contreras, DeSimone, Katzman, Lutts, Murphy, Russell, Scott, Veira
Mattera (chair)

Voting in the negative: None
Absent: Zahlaway Belsito

* * *

Academic Affairs and Student Life: Trustee Chisholm announced that all of the Academic Affairs motions would be read and then one vote would be taken. Chisholm then introduced the first motion:

Academic
Affairs:
MSCA
Tenure &
Promotions

Motion 1: To recommend to the full board the personnel actions for Faculty Tenure as presented (AA-17-04).

Trustee Contreras presented the next motion:

Motion 2: To recommend to the full board the personnel actions for Faculty Tenure with Promotion to the rank of Associate Professor as presented (AA-17-05).

Trustee DeSimone read the third motion:

Motion 3: To recommend to the full board the personnel actions for Faculty Promotion to the rank of Full Professor, Associate Professor and Librarian as presented (AA-17-06).

Trustee Murphy read the next motion:

Motion 4: To recommend to the full board the personnel actions for Faculty and Promotion to the rank of Professor Emeritus, Professor Emerita, Associate Professor Emerita, and Assistant Professor Emerita as presented (AA-17-07).

Finally, Trustee Russell read the last motion:

Motion 5: To recommend to the full board the personnel actions for Faculty Terminal Contract as presented (AA-17-08).

Trustee Chisholm hearing no further discussion, asked for a second and Trustee DeSimone duly seconded the motions. Upon a roll call vote it was unanimously,

VOTED: Voting in the affirmative: Chisholm, Contreras, DeSimone, Katzman, Lutts, Murphy, Russell, Scott, Veira, Mattera (chair)
Voting in the negative: None
Absent: Zahlaway Belsito

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Executive - Chair Mattera turned this portion of the meeting over to Trustee Lutts, chair of the Presidential Review Committee. Trustee Lutts thanked his fellow committee members Trustees Chisholm and DeSimone and provided an overview of the report. The Board has strong confidence in President Keenan and his continued leadership of the university. The report conveys the Board's support of the president's performance, provides some recommendations, and covers materials requested by the Department of Higher Education. Once the report receives the Board's approval the review will be submitted to the Commissioner of Higher Education by June 30th.

Chair Mattera, hearing no further discussion asked if there was a motion. Trustee Chisholm offered a first which was duly seconded by Trustee DeSimone and upon a roll call vote it was unanimously,

VOTED: The Board of Trustees of Salem State University hereby approves the annual review of John D. Keenan for 2017-2018 to be submitted to the Board of Higher Education (EX-17-03).

Voting in the affirmative: Chisholm, Contreras, DeSimone, Katzman, Lutts, Murphy, Russell, Scott, Veira, Mattera (chair)

Voting in the negative: None

Absent: Zahlaway Belsito

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IV. REPORT OF THE PRESIDENT – President Keenan began by noting that his first year as president had been a bit of uncharted waters. Marked by some difficulties – beginning with racist vandalism on the baseball field and the loss of student Chris Joyce but also good moments as the university saw 2,200 new graduates at Commencement, finished its strategic plan and rolled out the results of the Campus Climate survey and some curriculum changes. Salem State has put forth its best case for the Science Teaching Laboratory Addition (STLA) and now it’s up to the state to determine the level of funding for the project. We have made progress notwithstanding the financial challenges.

The president then turned to Executive VP Scott James who announced that our six year graduation rate looks like it will be above the 57% mark (results will not be finalized until the end of the summer). This is approximately a 20 point increase over 11 years (unprecedented).

President Keenan thanked his leadership team and the Board for a successful transition year and he acknowledged Rebecca Comage for all of her efforts and stepping in as the Interim Chief Diversity & Inclusion Officer.

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V. REPORT OF THE CHAIR - Chair Mattera took a moment to reflect on the good work that the Board does and to acknowledge the honor of serving as Board Chair. The Board does great work and have been strong advocates to the Governor for candidates that are diverse and reflective of the values of the university community. One of Chair Mattera’s responsibilities is that his fellow trustees’ voices are heard at the Board of Higher Education.

Chair Mattera then commented on Trustee Pam Scott’s ten years of admirable service to Salem State. He expressed his gratitude for Pam’s guidance and counsel, as a former chair, and his appreciation for her friendship. Pam was appointed in November 2009 and then reappointed in 2013 both times by Governor Patrick. Pam served three terms as Board Chair and also has served on all of the Board committees and led special committees including Presidential Review and Bylaws. She has keen business, operational and organizational knowledge of the university and is frequently tapped for her institutional knowledge. With President Meservey, Pam led the Board on a cautious exploration of Montserrat College of Art.

Executive:
Annual
Review of
the
President

Report of
the
President

Report of
the Chair

Old
Business:

Nominating
Committee
Report &
Election of
Officers for
AY 2018-
2019

Pam is the founder, president and CEO of LVCC, Inc., a business consulting firm, and has more than 30 years of experience in the financial services industry including multiple roles in institutional asset and investment management at State Street Corporation, U.S. Trust Company of New York and Citibank. Since retiring from the banking industry, Pam was a director of Beverly National Bank and became a director of Blue Hills Bank and Danvers Bancorp, Inc. after its acquisition of Beverly National Bank. She has also served in various leadership roles with a number of nonprofits over the years, including with the United Way of Massachusetts Bay and Merrimack Valley and The Boston Club and Girls, Inc. of Lynn.

Pam is a native of Houston, Texas. She received her BA from Rice University and her MBA from the Tuck School of Business at Dartmouth College, as the business program's first African American female graduate where she now serves as a mentor to young professionals and MBA students. Since 2009, Pam has brought her extensive business background, her knowledge of corporate and nonprofit finance, and her leadership skills to the Board of Trustees.

Trustee Scott thanked the Board for their kind words and said she was honored and proud to have served alongside the trustees and thanked them for their tireless work.

* * *

VI. OLD BUSINESS:

Nominating Committee Report and Election of Officers for AY 2018-2019 – Trustee Katzman thanked the Nominating committee members Trustees Chisholm and Murphy, reviewed committee minutes and presented its recommendation: Trustee Paul Matter as Chair and Trustee Rob Lutts as Vice Chair. There were no nominations from the floor and there was no further discussion. Trustee Katzman read the committee motion; it was seconded by Trustee Chisholm. It was unanimously

VOTED: The Board of Trustees of Salem State University re-elect Paul Mattera as Chair and Rob Lutts as Vice Chair for FY2019, effective July 1, 2018 (OB-17-03).

Voting in the affirmative: Chisholm, Contreras, DeSimone, Katzman, Lutts, Murphy, Russell, Scott, Veira, Mattera (chair)

Voting in the negative: None

Absent: Zahlaway Belsito

VII. NEW BUSINESS:

Executive Committee Election – Chair Mattera explained that in accordance with the bylaws the Executive Committee is composed of the chair, vice chair, and president of the university. The remaining three seats on the Executive Committee are to be filled by election of the board members. Traditionally these seats have been filled by the longest serving members. Trustee DeSimone offered the following motion which was seconded by Trustee Russell, and by unanimous roll call it was

VOTED: The Board of Trustees of Salem State University hereby elect Trustees Chisholm, Murphy and Katzman to the Executive Committee for FY2019 (NB-17-3).

Old
Business:

Nominating
Committee
Report &
Election of
Officers for
AY 2018-
2019

New
Business:

Executive
Committee
Election
For FY2019

Voting in the affirmative:	Chisholm, Contreras, DeSimone, Katzman, Lutts, Murphy, Russell, Scott, Veira, Mattera (chair)
Voting in the negative:	None
Absent:	Zahlaway Belsito

Draft SSU Performance Dashboard – President Keenan distributed a draft university performance dashboard for the board’s review. Executive Director for Strategic Planning and Decision Support Chunju Chen compiled the comprehensive package. The president suggested the Board review the dashboard as homework over the summer and then the committee chairs meet with senior team members to flesh out what information would be most helpful.

Committee Schedule Discussion - There was a discussion regarding the committee meeting schedule from which Chair Mattera discerned there was consensus for the committees to meet on one day in one sitting; but perhaps lengthen the meeting duration, flip-flop times of day, serve a meal and add some socialization at each meeting. Committee chairs will still need to negotiate through the Board office and work with the Board Secretary on how much time they need at each meeting. Then each Board meeting agenda we will have an educational opportunity – guest speakers, governance discussions, faculty presentations, orientation, annual review, etc. Upon further discussion, it was determined that morning meetings were not the most convenient for some of the faculty present so the decision was made to keep meetings in the afternoon and add an occasional meal or opportunity for socialization.

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VIII. OPEN FORUM -

Open Forum

Chair Mattera announced the open forum portion of the meeting and asked for any comments or discussion. Professor Burchsted thanked the group for the night’s inclusive discussion and for welcoming faculty to talk. Chair Mattera hearing no additional comments closed the forum.

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IX. ADJOURNMENT

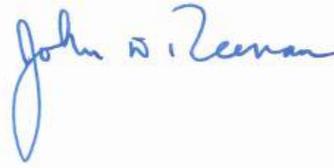
There being no further business to come before the Board and on a motion made by Trustee Lutts and seconded by Trustee DeSimone, it was unanimously:

Adjournment

VOTED: to adjourn the meeting at 7:02 pm

Voting in the affirmative:	Chisholm, Contreras, DeSimone, Katzman, Lutts, Murphy, Russell, Scott, Veira, Mattera (chair)
Voting in the negative:	None
Absent from vote:	Zahlaway Belsito

Respectfully submitted,

A handwritten signature in blue ink that reads "John W. Keenan". The signature is written in a cursive style with a large initial 'J'.

John Keenan
President

A handwritten signature in black ink that reads "Lynne Montague". The signature is written in a cursive style.

Lynne Montague
Secretary to the Board of Trustees

Meeting of the Board of Trustees

Agenda

June 6, 2018 at 5pm

Petrowski Conference Room

Marsh Hall, Room 210, Central Campus

Salem State University

Salem, Massachusetts

Consent Agenda

Approval of the following Meeting Minutes and Committee Reports:

Board of Trustee Meeting: April 11, 2018 (filed & posted separately)

Finance and Facilities: May 23, 2018

Institutional Advancement, Marketing & Communications: May 23, 2018

Risk Management & Audit: May 23, 2018

Risk Management & Audit Executive Session: May 23, 2018

Academic Affairs: May 23, 2018

Executive: May 23, 2018

Nominations: May 23, 2018



 REQUEST FOR TRUSTEE ACTION

Date: April 27, 2018
To: Board of Trustees
From: Karen P. House, Vice President for Finance and Facilities
Subject: Investment Management Contract Renewal
Requested Action: Approval

The Board of Trustees approved the appointment of Eastern Bank Wealth Management as the university's investment manager on October 8, 2014 following a competitive request for proposal process. The university entered into a three-year contract on October 14, 2014 through December 15, 2017 with two options to renew for one year each. The Board exercised its first of two options to reappoint Eastern Bank Wealth Management for one year beginning December 16, 2017. At this time, the university recommends exercising the final renewal year with Eastern. If, however, the Board of Trustees decides not to renew the contract for its final term, the university would need to begin the procurement process soon.

MOTION

The Board of Trustees of Salem State University hereby approves the reappointment of Eastern Bank Wealth Management to provide investment management services for certain Salem State University trust funds and authorizes the administration of the university to renew the contract for one year beginning December 16, 2018.

This resolution is effective upon its approval.

Committee Assigned: Finance & Facilities

Committee Action: Approved

Date of Action: May 23, 2018

Trustee Action: Approved

Trustee Approval Date: June 6, 2018

Effective Date: June 6, 2018

Signed: *Karen P. House*

Title: Secretary of the Board of Trustees

Date: 6/6/2018



 REQUEST FOR TRUSTEE ACTION

Date: May 16, 2018
To: Board of Trustees
From: Karen P. House, Vice President for Finance and Facilities
Subject: FY 2019 University Fees
Requested Action: Approval

MOTION

The Finance and Facilities Committee hereby recommends that the Board of Trustees approve the following motion pertaining to fees for FY 2019.

Recommended motion

The Board of Trustees of Salem State University hereby approves the fees as shown in the attached tuition and fee rate schedule (Appendix IV). The new rates shall be effective for the 2018-19 academic year (FY 2019). The president and other officers of the university are hereby authorized to do all things and take all actions deemed necessary to implement this decision.

 Committee Assigned: Finance & Facilities

Committee Action: Approved

 Date of Action: May 23, 2018

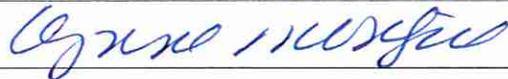
Trustee Action: Approved

Trustee Approval Date: June 6, 2018

 Effective Date: June 6, 2018

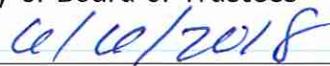


Signed:



Title: Secretary of Board of Trustees

Date:





**Schedule of Student Charges
2018-19 Academic Year**

IN-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Day Undergraduate					
Tuition					
In-State	\$37.92	\$455.00	\$37.92	\$455.00	\$910.00
Fees					
University Fee ¹	\$395.95	\$4,751.40	\$395.95	\$4,751.40	\$9,502.80
Capital Improvement Fee	\$15.45	\$185.40	\$15.45	\$185.40	\$370.80
SGA Fee	\$4.20	\$50.40	\$4.20	\$50.40	\$100.80
Total Tuition and Fees					
In-State	\$453.52	\$5,442.20	\$453.52	\$5,442.20	\$10,884.40
Evening Undergraduate (SCPS)					
Tuition					
In-State	\$115.00		\$115.00		
Fees					
Course Fee	\$257.20		\$257.20		
Capital Improvement Fee	\$15.75		\$15.75		
SGA Fee	\$4.20		\$4.20		
Total Tuition and Fees					
In-State	\$392.15		\$392.15		
Graduate - Price Group 1					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$261.95		\$261.95		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$417.70		\$417.70		
Graduate - Price Group 2					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$301.35		\$301.35		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$457.10		\$457.10		
Graduate - Price Group 3					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$334.05		\$334.05		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$489.80		\$489.80		

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

IN-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Housing ²					
Peabody Hall/Bowditch Hall		\$4,475.00		\$4,475.00	\$8,950.00
Marsh Hall		\$4,982.50		\$4,982.50	\$9,965.00
Bates Complex - Double		\$5,050.00		\$5,050.00	\$10,100.00
Bates Complex - Single		\$5,435.00		\$5,435.00	\$10,870.00
Atlantic Hall - Double		\$5,527.50		\$5,527.50	\$11,055.00
Atlantic Hall - Single		\$6,165.00		\$6,165.00	\$12,330.00
Viking Hall - Double		\$5,092.50		\$5,092.50	\$10,185.00
Viking Hall - Single		\$5,397.50		\$5,397.50	\$10,795.00
Viking Hall - Double Suite		\$5,202.50		\$5,202.50	\$10,405.00
Viking Hall - Single Suite		\$5,507.50		\$5,507.50	\$11,015.00
Meal Plans					
Commuter Meal Plan ³		\$399.00		\$399.00	\$798.00
Resident Meal Plan ⁴		\$399.00		\$399.00	\$798.00
10-Meal Plan		\$1,738.00		\$1,738.00	\$3,476.00
14-Meal Plan ⁵		\$1,886.00		\$1,886.00	\$3,772.00
19-Meal Plan		\$1,973.00		\$1,973.00	\$3,946.00
Miscellaneous Fees					
Mass PIRG Fee (waivable each semester) ⁶		\$10.00		\$10.00	\$20.00
Resident Parking (Atlantic and Peabody lots)		\$275.00		\$275.00	\$550.00
Resident Parking (Bates lot)		\$250.00		\$250.00	\$500.00
Resident Parking (Marsh lot)		\$200.00		\$200.00	\$400.00
Commuter Parking		\$82.50		\$82.50	\$165.00
International Student Fee ⁷		\$375.00		\$375.00	\$750.00
Records Fee-for non-matriculated students		\$10.00		\$10.00	\$20.00

Online courses (undergraduate) per credit ⁸					\$50.00
Health Insurance -- (waivable) ⁹					\$2,985.00
Matriculation Fee -- new matriculated students (one-time)					\$250.00
Differential Fees for Undergraduate Programs					
Art ¹¹		\$125.00		\$125.00	\$250.00
Biology ¹⁰		\$250.00		\$250.00	\$500.00
Chemistry ¹¹		\$250.00		\$250.00	\$500.00
Communications ¹¹		\$125.00		\$125.00	\$250.00
Computer Science ¹¹		\$250.00		\$250.00	\$500.00
Dance ¹¹		\$125.00		\$125.00	\$250.00
Education ¹⁰		\$125.00		\$125.00	\$250.00
Geography (including Cartography) ¹¹		\$250.00		\$250.00	\$500.00
Geology ¹¹		\$250.00		\$250.00	\$500.00
Music ¹¹		\$125.00		\$125.00	\$250.00
Nursing ¹⁰		\$500.00		\$500.00	\$1,000.00
Social Work ¹⁰		\$125.00		\$125.00	\$250.00
Theatre (BA and BFA) ¹¹		\$125.00		\$125.00	\$250.00
Cohort Based Program Cost					
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2017 Cohort per credit ¹²					\$470.00
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2018 Cohort per credit ¹²					\$525.00

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

NOTES:

- 1 The University Fee represents the fee anticipated for 2018-19. Fees may change by action of the Board of Trustees.
- 2 Housing rates include (1) \$20 per semester/\$40 per year Residence Hall Association Fee for all residence halls; and (2) \$305 per semester/\$610 per year Technology/Student Fee for Bates (Double); \$362.50 per semester/\$725 per year Technology/Student Fee for Atlantic Hall (double), Marsh Hall and Viking Hall; \$400 per semester/\$800 per year Technology/Student Service Fee for Bowditch, Peabody, Bates (Single) and Atlantic Hall (Single).
- 3 Charged to all commuter students. Required for all first-year students in first two semesters of attendance; waivable for other students. Includes \$302 dining dollars and \$97 ClipperCash per semester.
- 4 Minimum required for residents of Atlantic Hall and Bates. Includes \$302 dining dollars and \$97 Clipper Cash per semester.
- 5 Minimum required for residents of Peabody, Bowditch, Marsh & Viking Halls. All plans include \$97 ClipperCash per semester 10-meal and 14-meal plans include \$200 Dining Dollars; 19-meal plan includes \$100 Dining Dollars.
- 6 Charged for all day students each semester. Student may opt out and have fee waived on line.
- 7 Applicable to all matriculated international students with a Salem State-issued visa (excluding ESL students)
- 8 All undergraduate students taking online courses to be charged \$50 per credit
- 9 Charged for all students enrolled in at least 75 percent of a full-time course load. Student may opt out and have fee waived if covered by other health insurance. Fall only prorated charge is \$1,253 and spring only prorated charge is \$1,748.
- 10 Annual additional fees applicable beginning with academic year 2016-17 entrants to the program (incoming or transfers).
- 11 Annual additional fees applicable beginning with academic year 2017-18 new entrants to the program (incoming or transfers)
- 12 Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) is a cohort based program with a charge of \$470 per credit for Summer 2017 entrants. Summer 2018 entering cohort will be \$525 per credit.

All charges are subject to change.



**Schedule of Student Charges
2018-19 Academic Year**

OUT-OF-STATE	Fall 2018		Spring 2019		Academic Year
	Per Credit	Full-Time	Per Credit	Full-Time	Full-Time
Day Undergraduate					
Tuition					
Out-of-State	\$293.75	\$3,525.00	\$293.75	\$3,525.00	\$7,050.00
Fees					
University Fee ¹	\$421.60	\$5,059.20	\$421.60	\$5,059.20	\$10,118.40
Capital Improvement Fee	\$15.45	\$185.40	\$15.45	\$185.40	\$370.80
SGA Fee	\$4.20	\$50.40	\$4.20	\$50.40	\$100.80
Total Tuition and Fees					
Out-of-State	\$735.00	\$8,820.00	\$735.00	\$8,820.00	\$17,640.00

Evening Undergraduate (SCPS)					
Tuition					
Out-of-State	\$285.00		\$285.00		
Fees					
Course Fee	\$257.20		\$257.20		
Capital Improvement Fee	\$15.75		\$15.75		
SGA Fee	\$4.20		\$4.20		
Total Tuition and Fees					
Out-of-State	\$562.15		\$562.15		

(1) International Students - Supplemental Charge - \$140 per credit

Graduate- Price Group 1					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$261.95		\$261.95		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$507.70		\$507.70		

Graduate - Price Group 2					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$301.35		\$301.35		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$547.10		\$547.10		

Graduate - Price Group 3					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$334.05		\$334.05		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$579.80		\$579.80		

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

OUT-OF-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Housing ²					
Peabody Hall/Bowditch Hall		\$4,475.00		\$4,475.00	\$8,950.00
Marsh Hall		\$4,982.50		\$4,982.50	\$9,965.00
Bates Complex - Double		\$5,050.00		\$5,050.00	\$10,100.00
Bates Complex - Single		\$5,435.00		\$5,435.00	\$10,870.00
Atlantic Hall - Double		\$5,527.50		\$5,527.50	\$11,055.00
Atlantic Hall - Single		\$6,165.00		\$6,165.00	\$12,330.00
Viking Hall - Double		\$5,092.50		\$5,092.50	\$10,185.00
Viking Hall - Single		\$5,397.50		\$5,397.50	\$10,795.00
Viking Hall - Double Suite		\$5,202.50		\$5,202.50	\$10,405.00
Viking Hall - Single Suite		\$5,507.50		\$5,507.50	\$11,015.00
Meal Plans					
Commuter Meal Plan ³		\$399.00		\$399.00	\$798.00
Resident Meal Plan ⁴		\$399.00		\$399.00	\$798.00
10-Meal Plan		\$1,738.00		\$1,738.00	\$3,476.00
14-Meal Plan ⁵		\$1,886.00		\$1,886.00	\$3,772.00
19-Meal Plan		\$1,973.00		\$1,973.00	\$3,946.00
Miscellaneous Fees					
Mass PIRG Fee (waivable each semester) ⁶		\$10.00		\$10.00	\$20.00
Resident Parking (Atlantic and Peabody lots)		\$275.00		\$275.00	\$550.00
Resident Parking (Bates lot)		\$250.00		\$250.00	\$500.00
Resident Parking (Marsh lot)		\$200.00		\$200.00	\$400.00
Commuter Parking		\$82.50		\$82.50	\$165.00
International Student Fee ⁷		\$375.00		\$375.00	\$750.00
Records Fee-for non-matriculated students		\$10.00		\$10.00	\$20.00

Online courses (undergraduate) per credit ⁸					\$50.00
Health Insurance -- (waivable) ⁹					\$2,985.00
Matriculation Fee -- new matriculated students (one-time)					\$250.00
Differential Fees for Undergraduate Programs					
Art ¹¹		\$125.00		\$125.00	\$250.00
Biology ¹⁰		\$250.00		\$250.00	\$500.00
Chemistry ¹¹		\$250.00		\$250.00	\$500.00
Communications ¹¹		\$125.00		\$125.00	\$250.00
Computer Science ¹¹		\$250.00		\$250.00	\$500.00
Dance ¹¹		\$125.00		\$125.00	\$250.00
Education ¹⁰		\$125.00		\$125.00	\$250.00
Geography (including Cartography) ¹¹		\$250.00		\$250.00	\$500.00
Geology ¹¹		\$250.00		\$250.00	\$500.00
Music ¹¹		\$125.00		\$125.00	\$250.00
Nursing ¹⁰		\$500.00		\$500.00	\$1,000.00
Social Work ¹⁰		\$125.00		\$125.00	\$250.00
Theatre (BA and BFA) ¹¹		\$125.00		\$125.00	\$250.00
Cohort Based Program Cost					
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2017 Cohort per credit ¹²					\$470.00
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2018 Cohort per credit ¹²					\$525.00

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

NOTES:

- 1 The University Fee represents the fee anticipated for 2018-19. Fees may change by action of the Board of Trustees.
- 2 Housing rates include (1) \$20 per semester/\$40 per year Residence Hall Association Fee for all residence halls; and (2) \$305 per semester/\$610 per year Technology/Student Fee for Bates (Double); \$362.50 per semester/\$725 per year Technology/Student Fee for Atlantic Hall (double), Marsh Hall and Viking Hall; \$400 per semester/\$800 per year Technology/Student Service Fee for Bowditch, Peabody, Bates (Single) and Atlantic Hall (Single).
- 3 Charged to all commuter students. Required for all first-year students in first two semesters of attendance; waivable for other students. Includes \$302 dining dollars and \$97 ClipperCash per semester.
- 4 Minimum required for residents of Atlantic Hall and Bates. Includes \$302 dining dollars and \$97 Clipper Cash per semester.
- 5 Minimum required for residents of Peabody, Bowditch, Marsh & Viking Halls. All plans include \$97 ClipperCash per semester 10-meal and 14-meal plans include \$200 Dining Dollars; 19-meal plan includes \$100 Dining Dollars.
- 6 Charged for all day students each semester. Student may opt out and have fee waived on line.
- 7 Applicable to all matriculated international students with a Salem State-issued visa (excluding ESL students)
- 8 All undergraduate students taking online courses to be charged \$50 per credit
- 9 Charged for all students enrolled in at least 75 percent of a full-time course load. Student may opt out and have fee waived if covered by other health insurance. Fall only prorated charge is \$1,253 and spring only prorated charge is \$1,748.
- 10 Annual additional fees applicable beginning with academic year 2016-17 entrants to the program (incoming or transfers).
- 11 Annual additional fees applicable beginning with academic year 2017-18 new entrants to the program (incoming or transfers)
- 12 Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) is a cohort based program with a charge of \$470 per credit for Summer 2017 entrants. Summer 2018 entering cohort will be \$525 per credit.

All charges are subject to change.

Fees below pertain to those courses offered by the School of Continuing and Professional Studies and School of Graduate Studies

Course fees	Range
Lab fees	\$25 - \$500 per course
Clinical Fees	\$15 - \$100 per course
Nursing Resource Center Fee	\$100 per course
Field Placement Fee for MSW courses (currently)	\$100 - \$250 per course
Institute Fee	\$100 per institute

Below are miscellaneous fees and fines that pertain to specific situations as noted**Application Fees**

Undergraduate Admissions	\$50
Graduate Admissions	\$50/online/\$100 paper
Comprehensive Exam Application-Graduate School	\$50

Parking fines

Various violations	\$25 - \$125 per violation
Violation Appeal Fee if appeal not granted	\$5 per violation

Late fees

Late application for degree (undergraduate and graduate)	\$50
Late payment (tuition and fees)	\$50/month
Payment plans (enrollment fee from TMS)	\$40/semester
Non-credit course fee	varies depending on course
Institutes (wintersession/summer)	varies depending on course

**Salem State University
FY 2019 Tuition and Fees
Graduate**

<u>Approved (AY 2019)</u>	
GRADUATE	
Price Group 1	3% Course Fee increase
Massachusetts Residents	
Per Credit	\$417.70
Per Course (3 credits)	\$1,253.10
Out of State Residents	
Per Credit	\$507.70
Per Course (3 credits)	\$1,523.10
International Student Fee Charge (per semester)	\$375.00
Price Group 2	6% Course Fee increase
Massachusetts Residents	
Per Credit	\$457.10
Per Course (3 credits)	\$1,371.30
Out of State Residents	
Per Credit	\$547.10
Per Course (3 credits)	\$1,641.30
International Student Fee Charge (per semester)	\$375.00
Price Group 3	8% Course Fee increase
Massachusetts Residents	
Per Credit	\$489.80
Per Course (3 credits)	\$1,469.40
Out of State Residents	
Per Credit	\$579.80
Per Course (3 credits)	\$1,739.40
International Student Fee Charge (per semester)	\$375.00

Note: The rates above include Tuition, Course Fee, and Capital Improvement Fee.

**Salem State University
FY 2019 Tuition and Fees
Continuing Education**

	<u>Current (AY 2018)</u>	<u>Proposed (AY 2019)</u>
Continuing Education		
Fall and Spring		4% Course Fee increase
Massachusetts Residents		
Per Credit	\$381.17	\$392.15
Per Course (3 credits)	\$1,143.51	\$1,176.45
Out of State Residents		
Per Credit	\$551.17	\$562.15
Per Course (3 credits)	\$1,653.51	\$1,686.45
International Student Supplemental Charge (per credit)	\$140.00	\$140.00
	<u>Summer 2018</u>	<u>Summer 2019</u>
Summer		4% Course Fee increase
Massachusetts Residents		
Per Credit	\$318.00	\$327.35
Per Course (3 credits)	\$954.00	\$982.05
Out of State Residents		
Per Credit	\$453.00	\$462.35
Per Course (3 credits)	\$1,359.00	\$1,387.05
International Student Supplemental Charge (per credit)	\$140.00	\$140.00

Note 1: The rates above for Fall and Spring include Tuition, Course Fee, Capital Improvement Fee, and SGA Fee.

Note 2: The rates above for Summer include Tuition, Course Fee, and Capital Improvement Fee.

Appendix IV

Salem State University Graduate Price Groups

Program	Program
Price Group 1	Price Group 2
Master's Programs	Master's Programs
English (MA)	Behavior Analysis (MS)
History (MA)	Counseling (MS)
Education - Master's Programs	Criminal Justice (MS)
Art (MAT)	Geo-Information Science (MS)
Chemistry (MAT)	Industrial/Organizational Psychology (MS)
Early Childhood Education (MEd)	Mathematics (MS)
Elementary Education (MEd)	Social Work (MSW)
English (MA/MAT)	Education - Master's Programs
English (MAT)	Higher Education in Student Affairs (MEd)
English to Speakers of Other Languages (ESOL) (MAT)	School Counseling (MEd)
History (MAT)	Education - Licensure Only Programs
Leadership in Physical Education & Movement Studies (MEd)	School Adjustment Counselor (Initial Licensure Only)
Library Media Studies (MEd)	School Counseling
Mathematics (MAT)	Graduate Certificate Programs
Middle School Education (MEd)	Applied Behavior Analysis
Middle School Math (MAT)	Clinical Trial Management
Physical Education (MAT)	Computer Science
Reading (MEd)	Counseling
Secondary Education (MEd)	Geo-Information Science
Spanish (MAT)	Sport Development and Management
Special Education (MEd)	
Education - Licensure Only Programs	Price Group 3
Early Childhood Education	Master's Programs
Elementary Education	Accounting (MS)
English to Speakers of Other Languages (ESOL)	Business Administration (MBA)
Mathematics	Nursing (MSN)
Middle School Education (Initial Licensure Only)	Occupational Therapy – Direct Entry (MS)
Reading	Occupational Therapy (MS)
Special Education	Graduate Certificate Programs
Graduate Certificate Programs	Business
Autism Spectrum Disorders	Financial Planning
Digital Studies	Nursing Education
Global Policy Analysis	
Holocaust and Genocide Studies	
Public History	
Public Policy and Administration	
Strategic Communications	
Teaching English to Speakers of Other Languages	
Writing and Rhetoric Studies	
Teacher Leadership	
Certificate of Advanced Graduate Study (CAGS)	
Educational Leadership	



REQUEST FOR TRUSTEE ACTION

Date: May 23, 2018
To: Board of Trustees
From: Finance & Facilities Committee
Subject: FY 2019 All Funds Budget
Requested Action: Approval

The Board of Trustees must approve an all funds budget for the coming fiscal year which begins on July 1, to provide for the operation of the university. Should the state appropriation or other assumptions differ materially from the estimates, a recommended revised budget will be brought forward to the board to consider in the fall. Fee rates are recommended to the Board in a separate motion and incorporated in the budgeted revenue figures. The approval of the budget includes approval for each separate trust fund as shown on the FY 2019 Trust Fund Budgets schedule included in the budget package.

 MOTION

The Finance and Facilities Committee hereby recommends that the Board of Trustees approve the following motion pertaining to the attached FY 2019 Salem State University All Funds Budget.

Recommended motion

The Board of Trustees of Salem State University hereby approves the Fiscal Year 2019 All Funds Budget as recommended by the president and as shown in the attached FY 2019 Salem State University All Funds Budget at the level of \$172.3 million in Managed Expenses. This action includes approval of the FY 2019 Trust Fund Budgets and the Contracts Exceeding \$500,000 each as included in the budget package. The president and other officers of the university are hereby authorized to do all things and take all actions deemed necessary to implement this decision.

Committee Assigned: Finance & Facilities
Committee Action: Approved
Date of Action: May 23, 2018
Trustee Action: Approved
Trustee Approval Date: June 6, 2018
Effective Date: June 6, 2018



Signed: *[Handwritten Signature]*
Title: Secretary, Board of Trustees
Date: 6/6/2018

FY 2019 Salem State University All Funds Budget

“Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society, and serve as a resource to advance the region's cultural, social and economic development.”



Budget Approach

Salem State University presents an All Funds Budget in a Management Report format that separates Managed Revenues, Expenses, and Net Income from Non-Cash Revenue and Expense activity. For completed years, the bottom line agrees to the audited financial statement presentation. Certain non-cash items are not controllable or predictable by the university and are therefore budgeted at zero. Refer to “Composition of the Budget and Relationship to Generally Accepted Accounting Principles (GAAP)” for further information.

Trust Funds

Appendix I is a matrix to assist the reader to understand the definition of each Trust Fund. In accordance with the university's [Trust Fund Guidelines](#) approved by the Board of Trustees in June 2016 and revised in October 2017, the Trust Funds Budget displays the budgeted revenues, expenses, and changes in net position for each of the official Trust Funds in a columnar format (see Exhibit 2).

Budget Overview

Salem State University presents its Fiscal Year 2019 All Funds Budget with Managed Revenues of \$172.3 million and Managed Expenses of \$172.3 million (see Exhibit 1). The budget relies on assumptions regarding all activities as of mid May 2018 which is especially relevant for student enrollment, tuition and fee rates, state appropriation and collective bargaining agreements (none of which are yet final). Non-cash revenues and expenses, primarily depreciation, is projected to reduce overall GAAP basis Net Position by \$9.3 million.

Key Elements of the Budget are Summarized Below

	FY 2018	FY 2019	FY 18 Change	FY 18 Change
	Projected	Budget	Amount	%
Key Assumptions, FY 2019 Budget				
Revenue: Price & Enrollment				
In-state, commuter (rate)	\$10,278	\$10,884	\$607	5.9%
Out-of-state, commuter (rate)	\$16,706	\$17,640	\$934	5.6%
Undergraduate Day Enrollment (Headcount - average Fall and Spring)	6,345	5,755	(590)	-9.3%
Tuition & Fee Revenue (\$M, net of financial aid (contra-rev & exp.))	\$63.539	\$64.261	\$0.722	1.1%
State Support				
State Appropriation (\$M, GAA + CBA + Formula Funding)	\$45.324	\$45.724	\$0.400	0.9%
State Capital Grant (\$M, non-cash revenue: Sophia Gordon Center)	\$3.400	\$0.000	(\$3.400)	-100.0%
Compensation				
Salary & Wages (\$M, Benefitted workforce)	\$74.101	\$73.707	(\$0.395)	-0.5%
Fringe Benefits Expense (\$M)	\$28.045	\$28.791	\$0.746	2.7%
Benefits Rates, incl. taxes	36.33%	37.14%	0.81%	2.2%
Facilities Related Expenses				
Utilities Expense (\$M)	\$4.000	\$4.208	\$0.208	5.2%
Debt Service Expense (\$M, Assessment + Interest Expense)	\$16.256	\$16.875	\$0.619	3.8%
Depreciation & Amortization (\$M, non-cash expense)	\$9.326	\$9.183	(\$0.143)	-1.5%
Major Capital Projects	none	none	none	none
Managed Net Income (\$M)	\$1.357	\$0.000	(\$1.357)	-100.0%
Overall Add to (Use of) Net Position (\$M)	(\$8.467)	(\$9.319)	(\$0.852)	10.1%

Enrollment Challenges

At the time of finalizing the budget, the university was short of its planned undergraduate day student enrollment target by approximately 460 students, a combination of lower than planned entering freshmen/transfers and a sizable reduction of returning students when compared to the prior year at the same point. Outreach and recruitment activities are underway and this number will fluctuate until the opening of the Fall semester. The enrollment shortfall resulted in a number of recent changes to the

budget including a significant reduction of budgeted revenues, selective reduction of non-compensation items, and the imposition of a hiring freeze effective May 8, 2018 in order to control compensation to a budget target. The university will continue increasing its investment in financial aid and marketing. In addition, Salem State will launch new academic programs such as a Master of Science in Accounting, MS in Athletic Training, and BS in IT to increase its offerings to a changing marketplace that includes declines in college-going age students. The university is advocating for legislative approval of offering clinical doctorates, given the strength of our programs in Occupational Therapy. Despite the pressures on undergraduate and continuing education enrollment totals, the university takes pride in the gains made towards the Massachusetts Department of Higher Education (DHE) system goals of college participation, college completion and closing achievement gaps.

Uncertainties

With input from a variety of sources, the effort to develop the FY 2019 All Funds Budget was significant. However, the following uncertainties are acknowledged:

- The Commonwealth's budget process is not expected to be complete until summer 2018. It is not certain how much the university will receive in FY 2019 base appropriation, formula (performance) funding, funding for the first year of new union contracts, or other financial support from the Commonwealth (state grants). The Governor and the House Ways and Means included \$44.444 million for the university in their proposed base operating appropriations for FY19. This is the same as was appropriated for FY18.
- The university is awaiting a decision from the Commonwealth regarding funding to build a Science Teaching Lab Addition. The university has not included state grant revenue nor spending from its own funds for this facility in the FY19 budget.
- While the Enrollment Management and Schools of Graduate Studies and Continuing and Professional Studies (DGCE) teams have worked hard to recruit students, any further change in undergraduate day enrollment or credit hour enrollment of DGCE students would impact revenue.
- Proposed tuition and fee rates incorporated in the development of the budget are being presented to the Finance and Facilities Committee and Board of Trustees concurrent with the budget (see Appendix IV) and are not yet approved.
- Approximately 93% of the full-time workforce is unionized. The contracts have all expired and were under negotiation for much of FY18. The Association of Professional Administrators (APA) contract expired on December 31, 2016; negotiations have concluded and the union ratified a new contract on May 10, 2018. The Massachusetts State College Association (MSCA) Day contract expired on June 30, 2017. A new contract has been negotiated and was ratified by the union on May 8-9, 2018. Both of these contracts await the formal state approval and funding process. The MSCA (DGCE) and the AFSCME contracts are not settled. A salary increase assumption has been used for budgeting purposes based on the financial bargaining parameters. The budget assumes the Commonwealth will fund the first year of the new labor contracts and that funding will roll into the base appropriation (General Appropriations Act).

- There is no provision for Governmental Accounting Standards Board (GASB) 68 or GASB 75 non-cash expenses included in the FY 2019 budget. Actual amounts will be provided by the Commonwealth as FY19 is being closed.

University Leadership

John D. Keenan began service as the university's 14th president on August 6, 2017. In a bold speech commemorating his formal inauguration on January 19, 2018, President Keenan laid out a clear vision for a thriving campus based on academic excellence, student success, and capital improvements. <https://www.salemstate.edu/news/president-john-d-keenans-inaugural-address> President Keenan's earliest priority has been accomplished: finalize the strategic plan and receive approval of it from the Board of Trustees and the Board of Higher Education (November 2017). With the selection and installation of a new president and the adoption of a new strategic plan, attention of the campus has turned toward detailed action steps and implementation. By May 2018, earliest strategies and action steps have been identified, quantified, and included as appropriate in the FY19 budget and the Multi Year Financial Projection (MYFP). As additional action steps are brought into focus that take into account the May 2018 enrollment shortfall, these, too will be quantified and included in the next update of the MYFP.

Strategic Plan

Developed through an inclusive and collaborative process, the four strategic goals of the university's plan are identified below. In addition, several other planning efforts have been underway, including enrollment and marketing planning, a financial aid leveraging study, academic program net revenue analysis, and evaluation of opportunities to expand on-line or hybrid delivery options. These studies will culminate in purposeful action steps to ensure the quality of programs, success of students, and vitality of the university's finances in the long run. Overarching goals of the strategic plan include:

Financial Vitality: Strengthen Salem State's financial foundation, align resources with priorities, and foster innovation to drive new revenue streams. Identify and implement additional opportunities to contain, reduce, or avoid future growth in costs. We must continue to work towards establishing a stronger financial base, by strategically growing enrollment, diversifying program delivery, and generating new sources of revenue. Current Business Intelligence efforts will provide the roadmap.

Collaboration, Inclusion and Stewardship: Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship. The pace of change in higher education requires a coordinated, committed and collaborative process of relationship- and trust-building among faculty, staff, students and external partners. The Campus Climate Study results will help guide us.

Academic Excellence: Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society. Our continued successes in academic excellence require support for faculty development in aid of pedagogical and curricular innovation (including alternative modes of course delivery), as well as greater connection to regional opportunities for experiential learning, continuing scholarship, and civic engagement.

Student Success: Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals. We aim to foster a supportive environment for student growth in the context of the North Shore's shifting demographics and evolving economic trends, with an eye toward providing nimbler responses to the needs of our students and their future employers.

Implementation of these goals will lead to success in the following areas:

- BHE "Big Three" (participation, completion, and closing achievement gaps)
- Inclusive Excellence
- Science & Healthcare on a Liberal Arts Foundation
- Place
- Civic Responsibility

Capital Planning

Science Teaching Lab Addition: As one of the university's highest priorities the Science Teaching Laboratory Addition is needed to meet student and industry demand for science and healthcare degrees and credentials. Construction of the proposed Science Teaching Laboratory Addition will serve the ever-increasing population of regional students seeking biology, chemistry, nursing and healthcare degrees. Our highest demand program is nursing, and Salem State's other health programs are important workforce growth areas that are experiencing increasing student interest. Biology and chemistry are strong and positioned for expansion. However, the university is lacking the laboratory facilities that meet current industry standards and accommodate this growth. Without increases in enrollment, the need to cover labor and facility-related expense growth with revenue growth places pressure on tuition and fees that is counter to our imperative to provide reasonable cost offerings to our students in fulfillment of our mission. The strategic plan for the STLA was submitted to DCAMM in December 2017 for review and consideration and the university is waiting to hear the outcome in May 2018.

Deferred Maintenance: In the fall of 2017 the university partnered with DCAMM and Sightlines to conduct a facilities condition assessment to identify maintenance needs, repair priority and estimated costs. Using their Building Portfolio Solutions methodology, Sightlines was able to provide information about campus maintenance needs and facilities benchmarking information using their Return on Physical Assets (ROPA+) methodology. This analysis enables DCAMM, MSCBA, and the university to identify strategies to address the deferred maintenance backlog (a ten year need of \$253M) and to optimize the limited available funding for deferred maintenance projects.

Multi Year Financial Projection (MYFP)

In FY 2017 the university developed its first-ever multi-year financial projection (MYFP). Planning assumptions, revenues, expenses, and cash flow projections have been rolled forward to encompass FY 2019 through FY 2022 in a baseline scenario; selected strategic initiatives were then layered into the MYFP to present an All-In view. For the baseline scenario the trend going forward indicates significant financial challenges. This is largely driven by declining enrollment, flat or modest state appropriation, and increasing compensation costs. The baseline serves as a motivating and informative tool which drives the campus to focus on those strategic initiatives and strategies which will change the financial trajectory. Primarily this means enrollment growth, although non-enrollment revenue generation is an

additional aid. President Kennan has established a goal of growing by 2000 students in ten years and plans are being developed to generate such growth.

Contracts Greater than \$500,000

In accordance with the Trust Fund Guidelines, the Board of Trustees must approve contracts greater than \$500,000 each and may do so in conjunction with approval of the budget. Appendix II provides a list of such contracts for FY 2019 for approval.

Composition of the Budget and Relationship to Generally Accepted Accounting Principles (GAAP)

Salem State University is in its third year of presenting an All Funds Budget. This means that all trust funds and fund types are included in the budget. Intentionally, the budget format is not the same as the GAAP format used in producing financial statements which are audited each year. The university's budget and quarterly management reports are presented in a summarized Managed Revenues and Expenses Report format which distinguishes between managed and non-cash revenue and expense activity. This Managed Revenues and Expenses format allows the reader to focus on the elements of the budget that university administration must control and manage and which impacts cash flows, while displaying the non-cash GAAP based revenue and expense items at the bottom. This approach enables the Managed Revenues and Expenses report to reconcile to GAAP-basis audited financial statements for completed years.

The Governmental Accounting Standards Board (GASB) has issued several new standards that are not reflected in the FY19 budget. The University is in the process of implementing GASB Statement No. 75, Accounting and Financial Reporting for Postemployment Benefits Other Than Pensions, in its FY18 financial statements. Consistent with its budgetary practice for GASB 68, Accounting and Financial Reporting for Pensions, the university will not have a reliable estimate for these non-cash expenses until information is received from the Commonwealth at the end of the fiscal year. Thus for budget purposes, the amount for GASB 68 and GASB 75 is shown as zero. The university anticipates future implementation of GASB 87, Leases, which is effective for periods beginning after December 15, 2019. There is nothing related to GASB 87 in the FY19 budget.

FY 2019 Budget Information

Refer to the [Exhibits](#) for the All Funds Budget and Trust Fund Budgets

Refer to the [Charts](#) for graphical depictions of revenues, expenses, and enrollment

Refer to the [Tables](#) for trends concerning the details of the budget

Refer to the [Appendices](#) for supporting materials:

- Appendix I – Trust Fund Matrix
- Appendix II – Contracts Estimated to Exceed \$500,000 Each in FY 2019 (approved with approval of the budget)
- Appendix III – Capital Projects
- Appendix IV – Tuition/Fee rates for FY 2019

Figures and amounts in the exhibits and tables may not total due to rounding.

Exhibit 1: Salem State University FY 2019 All Funds Budget

Account Description (\$ in thousands)	FY 2017 Year End Actuals	FY 2018 Year-to- Date April 2018 Actuals	FY 2018 Forecast as of 4/11/18	FY 2019 Original Budget
Managed Revenue				
Tuition and Fees	\$84,560	\$86,968	\$87,140	\$89,686
Less: Scholarships, Fellowships & Waivers	(23,321)	(23,954)	(23,600)	(25,424)
Net Tuition and Fees	61,239	63,014	63,539	64,261
Federal, State, Private Grants	19,306	18,544	18,613	19,180
Auxiliary Enterprises	22,519	22,851	23,199	24,383
State General Appropriations	58,768	50,281	59,898	60,767
Other Revenue	4,422	4,967	3,346	3,727
Total Managed Revenue	166,254	159,657	168,596	172,318
<i>Year over Year Change</i>			1.4%	2.2%
Managed Expenses				
Compensation	118,273	96,765	122,762	123,561
Support	17,991	14,303	18,393	21,303
Facility-related	24,669	23,960	26,083	27,454
Total Managed Expenses	160,934	135,028	167,239	172,318
<i>Year over Year Change</i>			3.9%	3.0%
Managed Net Income	5,320	24,629	1,357	0
Managed Cash Flow Ratio	3.2%	15.4%	0.8%	0.0%
Non-Cash Revenue / (Expenses)				
Capital Grants	7,711	0	3,400	0
Depreciation	(8,477)	(7,382)	(9,326)	(9,183)
Contributions to SSUAC	(896)	0	0	0
Unrealized Gains/Losses	738	(473)	(198)	(136)
GASB 68 Pension	(4,711)	0	(3,700)	0
Total Non-Cash Revenue / (Expenses)	(5,636)	(7,855)	(9,824)	(9,319)
<i>Year over Year Change</i>			74.3%	-5.1%
Total Increase / (Decrease) in Net Position	(316)	16,774	(8,467)	(9,319)

Exhibit 2: Salem State University FY 2019 Trust Fund Budget

Account Description (\$ in thousands)	Unrestricted Auxiliaries	Educational & General Funds	Grants	Gifts	Residence Halls	Restricted Other	Total Restricted Endowments	Net Invested in Capital Assets	FY 2019 Budget Total
Operating Revenue									
Net Tuition and Fees	\$0	\$82,290	(\$16,776)	(\$585)	(\$1,338)	\$671	\$0	\$0	\$64,261
Federal, State, Private Grants	0	0	19,180	0	0	0	0	0	19,180
Auxiliary Enterprises	3,284	439	0	0	20,535	125	0	0	24,383
State General Appropriations	0	60,767	0	0	0	0	0	0	60,767
Other Revenue	376	957	12	2,044	0	328	10	0	3,727
Total Managed Revenue	3,660	144,453	2,416	1,458	19,197	1,124	10	0	172,318
Managed Expenses									
Compensation	113	116,840	1,993	107	4,470	38	0	0	123,561
Support	188	18,577	423	751	367	998	0	0	21,303
Facility-related	3,208	11,908	0	600	14,400	89	0	(2,751)	27,454
Total Managed Expenses	3,509	147,325	2,416	1,458	19,237	1,124	0	(2,751)	172,318
Managed Net Income	151	(2,873)	0	0	(40)	0	10	2,751	0
Managed Cash Flow Ratio	4.1%	-2.0%	0.0%	0.0%	-0.2%	0.0%	100.0%	0.0%	0.0%
Non-Cash Revenue / (Expenses)									
Capital Grants	0	0	0	0	0	0	0	0	0
Depreciation	0	0	0	0	0	0	0	(9,183)	(9,183)
Contributions to SSUAC	0	0	0	0	0	0	0	0	0
Unrealized Gains/Losses	0	(136)	0	0	0	0	0	0	(136)
GASB 68 Pension	0	0	0	0	0	0	0	0	0
Total Non-Cash Revenue / (Expenses)	0	(136)	0	0	0	0	0	(9,183)	(9,319)
Total Increase/Decrease in Net Position	151	(3,008)	0	0	(40)	0	10	(6,432)	(9,319)

Exhibit 3: Five-Year Managed Revenue vs. Managed Expense Trend

Account Description (\$ in thousands)	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019
	Year End Actuals	Year End Actuals	Year End Actuals	Forecast as of 4/11/18	Original Budget
Managed Revenue					
Net Tuition and Fees	53,089	57,896	61,239	63,539	64,261
Federal, State, Private Grants	19,782	18,820	19,306	18,613	19,180
Auxiliary Enterprises	17,822	21,149	22,519	23,199	24,383
State General Appropriations	55,064	56,416	58,768	59,898	60,767
Other Revenue	4,365	4,593	4,422	3,346	3,727
Total Managed Revenue	150,122	158,874	166,254	168,596	172,318
<i>Year over Year Change</i>		5.8%	4.6%	1.4%	2.2%
Managed Expenses					
Compensation	107,510	112,436	118,273	122,762	123,561
Support	17,842	18,568	17,991	18,393	21,303
Facility-related	20,096	22,934	24,669	26,083	27,454
Total Managed Expenses	145,448	153,939	160,934	167,239	172,318
<i>Year over Year Change</i>		5.8%	4.5%	3.9%	3.0%
Managed Net Income	4,674	4,935	5,320	1,357	0

Chart 1: Five-Year Managed Revenue vs. Managed Expense Trend



Chart 2: Components of FY 2019 Revenue Budget

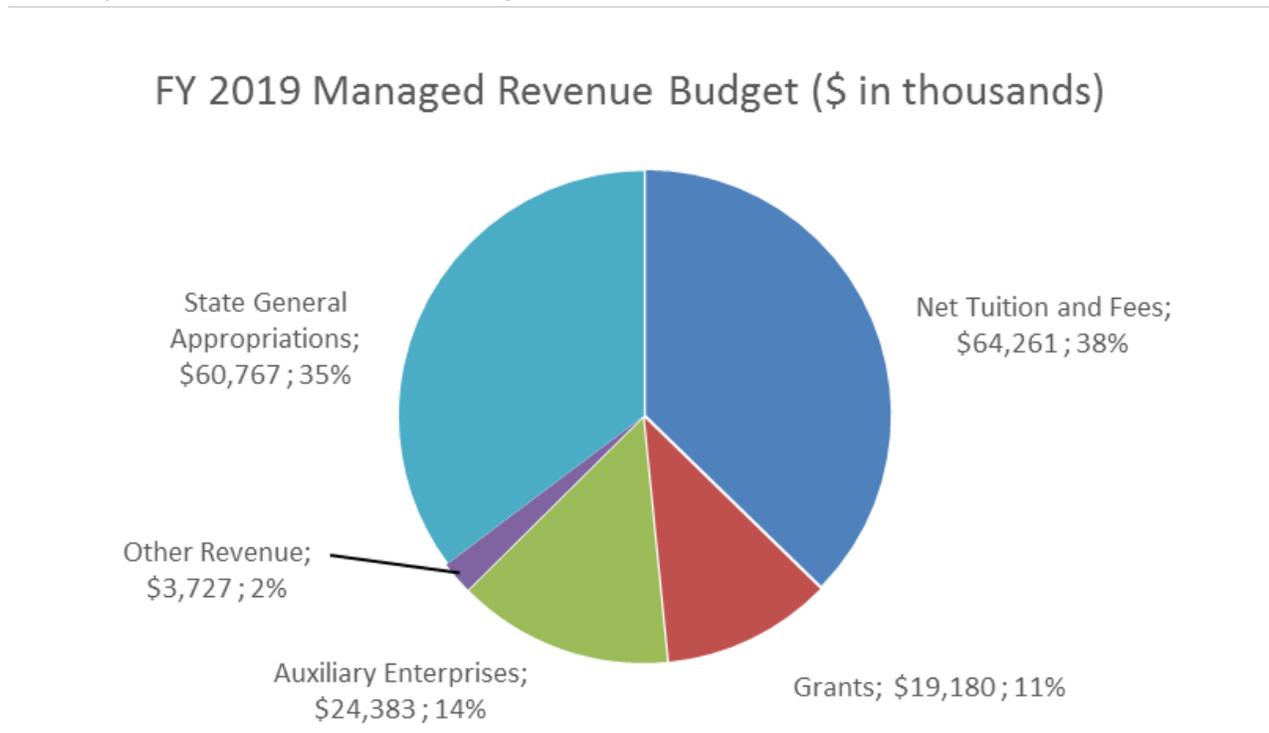


Chart 3: Components of FY 2019 Expense Budget

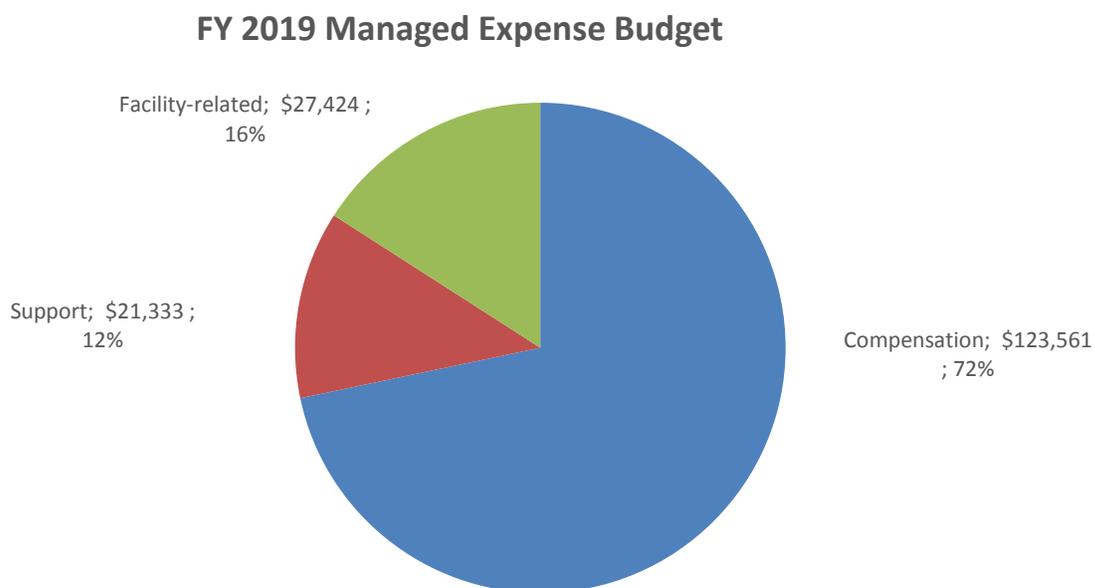


Chart 4: Credit Hours Delivered by Student Type – Full Years 2012 - 2017

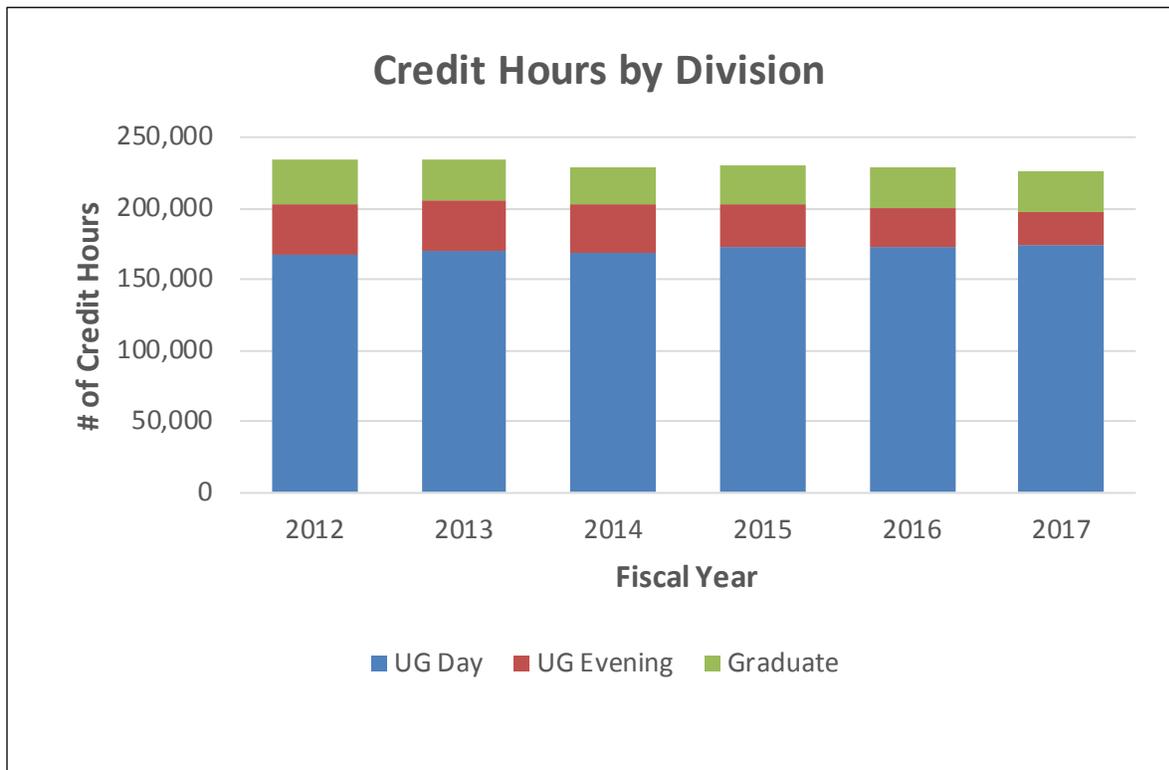


Chart 5: Preliminary Fall Enrollments (Registrations) for 2016 - 2018 (Fall only) as of May 11th

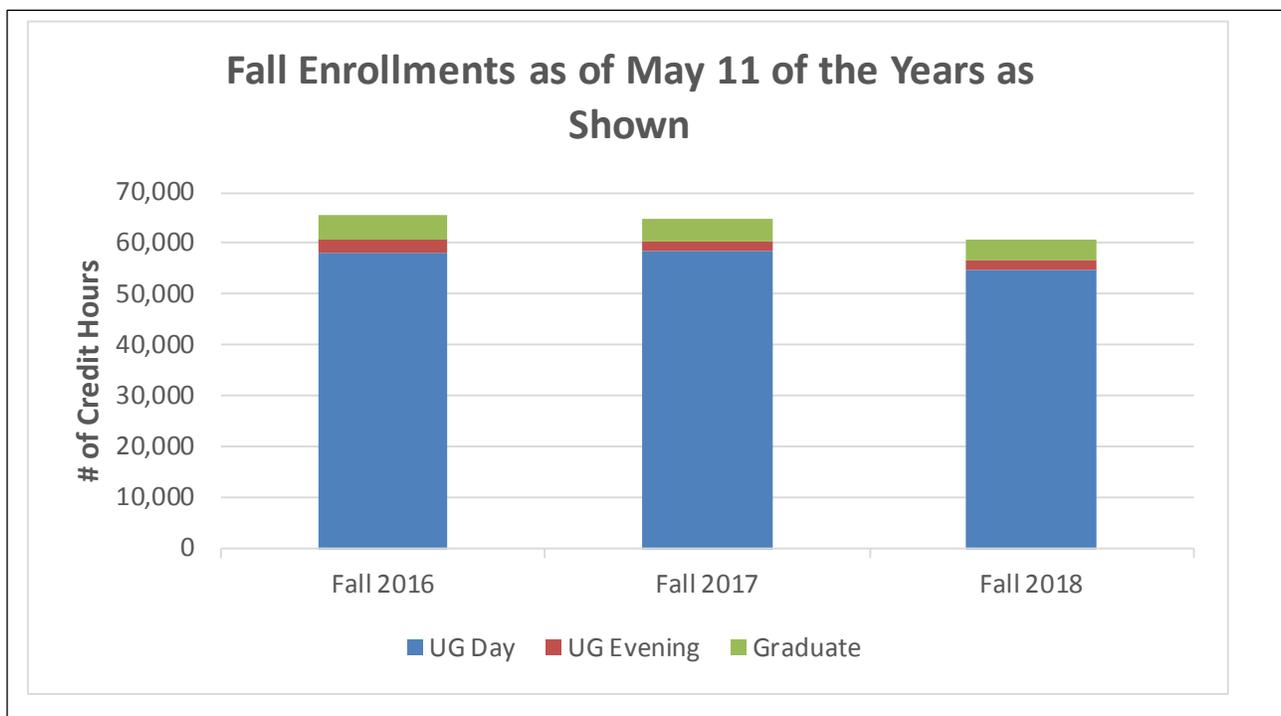


Table 1: Managed Revenue

Revenue (\$ in millions)	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change
Net Tuition and Fees	\$53.1	\$57.9	\$61.2	\$63.5	\$64.3	\$0.7	1.1%
Federal, State, Private Grants	55.1	56.4	58.8	59.9	60.8	0.9	1.5%
Auxiliary Enterprises	17.7	21.0	22.4	23.2	24.4	1.2	5.1%
State General Appropriations	19.8	18.8	19.3	18.6	19.2	0.6	3.0%
Other Revenue	4.1	4.3	5.3	3.1	3.6	0.4	14.1%
Total Managed Revenue	\$149.7	\$158.4	\$167.0	\$168.4	\$172.2	\$3.8	2.2%

Table 2: Fee Revenue

Fee Revenue (\$ in millions)	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change	Percent Fee Increase
University Fee	\$55.0	\$59.4	\$61.9	\$64.1	\$66.1	\$2.0	3.1%	5.4%
Capital Improvement Fee	1.2	1.7	2.6	2.8	2.8	0.0	-0.8%	7.0%
SGA Fee	0.0	0.0	0.5	0.6	0.6	0.0	1.2%	0.0%
Other Fee Revenue	3.7	3.9	4.5	5.2	5.9	0.7	14.3%	Varies
Total Fee Revenue	\$59.9	\$65.1	\$69.6	\$72.7	\$75.4	\$2.7	3.7%	

Note: Other Fee Revenue includes on-line, differential, lab, matriculation, Summer Bridge, housing premium and miscellaneous fees

Table 3: Budget Impact of Undergraduate Day Tuition & Fee Scenarios

Tuition & Fee Rate Change Impact			
% Change in Undergrad Tuition & Fees	FY 2019 Budget Impact (in \$M)	Rate Change From FY18	New Rate For FY19
4.0%	\$(1.0)	\$411	\$10,689
5.0%	\$(0.5)	\$514	\$10,792
5.9%	\$0.0	\$606	\$10,884
7.0%	\$0.6	\$719	\$10,997
8.0%	\$1.1	\$822	\$11,100

Note: all calculations based on In-state UG Day Tuition, University Fee, Capital Improvement Fee, and SGA Fee

5.9% is the current rate for the FY 2019 budget.

Table 4: Historical Credit Hours by Division

Student Type	Full Fiscal Year Credit Hours				
	2013	2014	2015	2016	2017
Undergraduate Day	169,552	168,919	172,772	173,274	173,338
Continuing Education	36,397	33,594	29,856	26,935	24,171
Graduate	27,799	25,983	27,255	27,941	27,839
Total Credit Hours	233,748	228,495	229,883	228,150	225,348
<i>Year over year %</i>		<i>(2.2%)</i>	<i>0.6%</i>	<i>(0.8%)</i>	<i>(1.2%)</i>

Table 5: Financial Aid

Financial Aid (\$ in millions)	FY2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change
Tuition Waivers	\$1.6	\$2.5	\$2.7	\$2.6	<i>\$(0.1)</i>	<i>(5.0%)</i>
Scholarships & Grants	20.0	20.8	20.9	22.8	2.0	9.4%
Total Financial Aid	21.6	23.3	23.6	25.4	1.8	7.7%
As a % of Gross Tuition and Fees	27.2%	27.6%	27.1%	27.2%		

Financial Aid by Funding Source	Educational & General		Residence Hall		Gifts	Total
	Grants	Trust Fund	Grants	Trust Fund		
FY 2019 Budget by Source (\$ millions)		\$6.7	\$16.8	\$1.3	\$0.6	\$25.4
FY 2019 Budget by Source (% of total)		26.4%	66.0%	5.3%	2.3%	100.0%

Note: FY 2019 Education & General comprised of \$2.6M in tuition waivers and \$4.1M in unrestricted institutional aid.

Table 6: State Operating Support

Appropriations (\$ in millions)	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change
General Appropriations Act (GAA)	\$44.0	\$43.5	\$44.9	\$44.4	\$45.3	\$0.9	2.0%
CBA on State Appropriated Payroll	0.0	0.0	0.0	0.9	0.0	-0.9	-100.0%
Funding Formula Allocation	0.0	0.5	0.0	0.0	0.4	0.4	0.0%
Total Base Appropriation	44.0	44.0	44.9	45.3	45.7	0.4	0.9%
State Paid Fringe	11.8	12.8	14.8	15.5	16.0	0.5	3.3%
Tuition Remission	-0.8	-0.9	-0.9	-0.9	-1.0	0.0	4.0%
Other Appropriations	0.0	0.5	0.0	0.0	0.0	0.0	0.0%
Total State Support	\$55.1	\$56.4	\$58.8	\$59.9	\$60.8	\$0.9	1.5%

Table 7: Managed Expenses

Managed Expenses (\$ in millions)	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change
Compensation (See tables 8 - 12 for detail)	\$107.5	\$112.4	\$118.3	\$122.8	\$123.6	\$0.8	0.7%
<i>Administrative Expenses</i>	\$4.4	\$5.0	\$5.2	\$5.1	\$5.4	\$0.3	5.9%
<i>Programmatic Operational Supplies</i>	\$3.3	\$3.2	\$3.1	\$2.7	\$3.2	\$0.5	16.9%
<i>Contracted Services</i>	\$4.4	\$3.9	\$3.7	\$3.2	\$3.9	\$0.7	22.6%
<i>IT and Telecom</i>	\$4.4	\$5.1	\$4.7	\$4.9	\$5.9	\$0.9	18.8%
<i>Contingency</i>	\$0.0	\$0.0	\$0.0	\$1.2	\$1.7	\$0.5	43.1%
<i>Other</i>	\$1.4	\$1.4	\$1.3	\$1.3	\$1.3	\$0.0	0.4%
Total Support	17.8	18.6	18.0	18.4	21.3	2.9	15.8%
<i>Utilities</i>	4.3	4.3	4.2	4.0	4.2	0.2	5.2%
<i>MSCBA Assessment & Interest Expense</i>	10.7	14.1	15.2	16.3	16.9	0.6	3.8%
<i>Space Rental</i>	1.7	1.5	1.4	1.7	1.7	0.0	2.5%
<i>Construction & Improvement</i>	2.8	3.0	3.8	4.1	4.6	0.5	12.1%
<i>Other</i>	0.6	0.0	0.0	0.0	0.0	0.0	0.0%
Total Facility-related	20.1	22.9	24.7	26.1	27.5	1.4	5.3%
Total Managed Expenses	\$145.4	\$153.9	\$160.9	\$167.2	\$172.3	\$5.1	3.0%

Table 8: Compensation

Salaries and Wages (\$ in millions)	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change
Benefitted Faculty and Staff	\$67.0	\$70.1	\$71.7	\$74.1	\$73.7	-\$0.4	-0.5%
Adjunct Faculty	11.3	12.0	11.8	12.3	12.6	0.3	2.2%
Student Labor	2.9	3.3	3.1	3.0	3.2	0.2	5.6%
Contract Employees	2.1	1.9	2.2	1.9	1.9	0.1	4.3%
Other Labor	3.7	3.0	3.0	3.4	3.3	-0.1	-2.3%
Total Salaries and Wages	\$87.0	\$90.2	\$91.9	\$94.7	\$94.8	\$0.1	0.1%
Fringe Benefits	20.5	22.3	26.4	28.0	28.8	0.7	2.7%
Total Compensation	\$107.5	\$112.4	\$118.3	\$122.8	\$123.6	\$0.8	0.7%

Note: Other Labor includes overtime, vacation, holiday, sick payouts, and other categories.

Table 9: Financial Full-Time Benefitted Employees (FFTE) by Union Classification

Financial Full-Time Benefitted Employees (FFTE)*	FY 2016 Budget	FY 2017 Budget	FY 2018 Budget	FY 2019 Budget	FFTE Change	% Change FY18-FY19	FY 19 % of Total
Clerical Union (AFSCME)	253	257	253	252	(1)	-0.4%	26.2%
Professional Union (APA)	276	283	276	283	8	2.8%	29.4%
Day and DGCE Faculty (MSCA)	371	377	362	364	3	0.7%	37.9%
Professional Non-Union (NUP)	58	58	62	63	2	2.4%	6.6%
Clerical Non-Union (NUC)	6	6	9	10	1	11.1%	1.0%
Total FFTE	964	981	961	973	12	1.2%	101.2%

*Financial Full-Time Benefitted Employees is equal to the ratio of the total number of paid hours to benefitted employees during the fiscal year (full time and part time) by the number of working hours in the same period.

Table 10: Financial Full-Time Benefitted Employees (FFTE) by Division

Financial Full-Time Benefitted Employees (FFTE)	FY 2018 Budget	FY 2019 Budget	FY18 % of Total	% Change FY18-FY19
Academic Affairs	531	534	54.9%	0.5%
Executive Vice President	237	238	24.4%	0.4%
Institutional Advancement	29	29	3.0%	0.0%
Finance and Facilities	117	119	12.2%	1.0%
President's Division	46	52	5.3%	12.1%
Inclusive Excellence	2	2	0.2%	0.0%
Total Financial Full-Time Benefitted Employees	962	973	100.0%	1.1%

Note: In FY 2018 with the incoming new President, the previous Administration Division was abolished. Departments were reassigned between the President's Division, Executive VP Division, and Finance and Facilities.

Table 11: Salary and Wages for Benefitted Employees by Division

Salary and Wages for Benefitted Employees by Division (\$ in thousands)	FY 2018 Budget	FY 2019 Budget	Amount Change	Percent Change
Academic Affairs	\$45,159	\$46,325	\$1,166	2.6%
Executive Vice President	17,188	17,420	232	1.4%
Institutional Advancement	2,321	2,404	83	3.6%
Finance and Facilities	7,421	7,710	289	3.9%
President's Division	3,544	3,841	297	8.4%
Inclusive Excellence	240	236	(4)	-1.7%
APA/NUP Other Increases	60	128	68	113.9%
MSCA Other Increases	601	633	32	5.3%
AFSCME/NUC Other Increases	186	156	(30)	-16.0%
Vacancy Savings Target (University-wide)	(1,534)	(5,146)	(3,611)	235.4%
Total Financial Full-Time Benefitted Employees	\$75,184	\$73,707	(\$1,478)	-2.0%

Table 12: FY2019 Frozen Positions as of May 08, 2018

Vacant Positions Impacted by Hiring Freeze - as of May 08, 2018		
Division	FY2019 \$ Budget	FY2019 FTE Budget
Academic Affairs	\$ 2,807,906	37.1
Executive Vice President	\$ 1,529,512	26.0
Institutional Advancement	\$ 207,833	3.0
Finance & Facilities	\$ 402,192	9.0
President's Division	\$ 266,555	4.6
Inclusive Excellence	\$ -	-
Total	\$ 5,213,998	78.6
FY2019 Vacancy Target (University-wide)	\$ 5,145,783	
Over/(Under) Vacancy Target	\$ 68,215	

Note: Table 12 reflects vacant positions by division when the hiring freeze went into effect on May 08, 2018.

Table 13: Fringe Benefit Rates as set by the Commonwealth

Benefit Description	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Actual	FY 2019 Budget	Absolute Change	Estimate Change
Group Insurance	16.0%	18.8%	22.7%	22.1%	22.1%	0.0%	0.1%
Retirement	10.4%	9.5%	10.0%	11.8%	12.1%	0.3%	2.1%
Terminal Leave	0.9%	1.0%	0.8%	1.0%	1.3%	0.3%	24.8%
Subtotal	27.3%	29.2%	33.5%	34.9%	35.4%	0.5%	1.5%
Unemployment Insurance	0.3%	0.3%	0.3%	0.2%	0.3%	0.1%	59.0%
Universal Health Insurance	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	63.3%
Medicare Tax	1.3%	1.3%	1.3%	1.2%	1.3%	0.1%	11.5%
Subtotal	1.6%	1.7%	1.7%	1.5%	1.7%	0.3%	19.6%
Total Fringe Benefit Rate	28.9%	30.8%	35.2%	36.3%	37.1%	0.8%	2.2%

Table 14: Cash Flow Projection

<i>(\$ in thousands)</i>	FY 2019 Budget
Cash Flow Projection Summary	
Beginning Cash Balance as of 7/1/2018 (estimated)	\$14,500
Cash Flows:	
Managed Net Income	\$0
Reduce by capitalization assumption (balance sheet)	(\$800)
Reduce by principal payments (balance sheet)	(\$1,951)
Net Change in Cash Flows for FY18	(\$2,751)
End of Year Cash Balance as of 6/30/2019 (estimated)	\$11,749

Appendix I: Trust Fund Matrix

Trust Fund	Description	Examples
L3_Agency	Funds held by Salem State as custodian / fiscal agent for others	Fund 6222 - Unclaimed Checks
L3_Education & General Funds	Basic operations of the university;unrestricted funds	Fund 1000 - State Maintenance Appropriation
L3_Gifts	Funds donated by others outside the university for a specific purpose	Fund 2313 - Departmental Gifts
L3_Grants	Funds provided by an external party in return for a specific project or other action by the university. Majority of SSU's grants are for financial aid to students	Fund 2200 -Pell Grant
L3_Net Invested in Capital Assets	Capitalizable facility projects; depreciation; debt.	Fund 7040 - Invested in Cap Assets-Net
L3_Residence Halls	Self-supporting operations that provide services to students, faculty, or staff; restricted by an entity outside of the university (MSCBA owned facility operations)	Fund 2517 - Atlantic Hall
L3_Restricted other	Funds provided by external parties with restrictions on how the funds are to be expended.	Fund 2304 - Alpha Lampda Delta
L3_Total Loan Funds	Funds provided by others for the purpose of Student Financial Aid in the form of loans, not grants. Debt belongs to the recipient, not the university.	Fund 4204 - Graduate Student Loan Fund
I3_Total Restricted Endowments	Most endowments are held by the Foundation, the university has one historical endowed fund.	Fund 5002- Cruttenden Endowment
L3_Unrestricted Auxiliaries	Self-supporting operations that provide services to students, faculty, or staff; not restricted by an entity outside of the university.	Fund 6204- Dining Hall Trust Fund

Appendix II: Vendors with Contracts in Excess of \$500,000 which are pre-approved upon approval of FY 2019 Budget

Salem State University FY 2019 Budget Package

Pre-approval of Contracts Exceeding \$500,000 in Accordance with Trust Fund Guidelines

Vendor Name	Vendor Description	Anticipated spending FY19	Trust Fund Name	PeopleSoft Fund Number	PeopleSoft Fund Name
331 Lafayette LLC	Lease expense	\$542,940	Educational & General	1100	University Fee
Cavalier Coach	Shuttle & charter bus service	\$550,000	Educational & General	1100	University Fee
Chartwells*	Food service provider	\$7,433,000	Unrestricted Auxiliaries	6204	Dining Trust Fund
Direct Energy Marketing Inc.	Natural gas delivery supplier	\$688,000	General**	1100	University Fee
Direct Energy Services LLC	Electric delivery supplier	\$1,500,000	General**	1100	University Fee
EAB	Marketing	\$750,000	Educational & General	1100	University Fee
Follett Higher Education Group***	Book vouchers, education materials	\$1,300,000	Educational & General	1100	University Fee
National Grid Electric	Electric service	\$1,250,000	General**	1100	University Fee
Red Thread LLC	Furniture & equip purchases	\$500,000	Educational & General	1100	University Fee
Salem State University-Assistance Corp.	Lease expense, SSU assistance	\$570,000	Educational & General	1100	University Fee
Software House International	Software subscription & support	\$660,000	Educational & General	1100	University Fee
To Be Determined	Roofing contactor for Meier Hall	\$1,200,000	Educational & General	1100	University Fee
University Health Plans, Inc.****	Student health insurance	\$1,745,000	Agency	6216	Health Insurance

Most of the above vendor are signed to multi-year contracts

** The University treats the revenues and expense to the food service provider as a flow-through within a liability account, based on the nature of the existing contract. Board plan override, commissions and a lump sum payments are recorded as revenues when earned*

*** Utility costs are allocated between Educational and General Trust Funds and the Residence Hall Trust Fund*

**** The University treats the revenues and expense for Follett as a flow-through within a liability account, based on the nature of the existing contract.*

***** The University treats the revenues and expense For University Health Plans, Inc.as a flow-through within a liability account, based on the nature of the existing contract*

Appendix III: List of Proposed Facilities Projects

Salem State University FY 2019 Budget Package

Location	Area	Project	Additional Funding	Recommended Funding Amount
Administration Building		Roof Replacement Study		\$26,200
Berry Library	Mechanical Room	Repair or Replacement of Climate Cooling System		\$200,000
Meier Hall		Roof Replacement	DCAMM (\$753,344)	\$1,136,656
O'Keefe Center	All Spaces	Master Plan Update For O'Keefe		\$30,000
Sophia Gorden Center		Investigate Humidity Issues / HVAC Solutions		\$50,000
Sullivan Building	Basement Storage	Structural Upgrades to Brace Failing Steel		\$500,000
Sullivan Building		Insulating Roof Deck to Prevent Ice Dams	DCAMM (\$272,193)	\$27,807
Campus Wide	IA Signage	Annual Fund		\$25,000
Campus Wide	ADA Committee	Annual Fund For Committee		\$10,000
Campus Wide	Classroom Refresh	Annual Fund		\$200,000
Contingency		TBD		\$420,000
				\$2,625,663



**Schedule of Student Charges
2018-19 Academic Year**

IN-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Day Undergraduate					
Tuition					
In-State	\$37.92	\$455.00	\$37.92	\$455.00	\$910.00
Fees					
University Fee ¹	\$395.95	\$4,751.40	\$395.95	\$4,751.40	\$9,502.80
Capital Improvement Fee	\$15.45	\$185.40	\$15.45	\$185.40	\$370.80
SGA Fee	\$4.20	\$50.40	\$4.20	\$50.40	\$100.80
Total Tuition and Fees					
In-State	\$453.52	\$5,442.20	\$453.52	\$5,442.20	\$10,884.40
Evening Undergraduate (SCPS)					
Tuition					
In-State	\$115.00		\$115.00		
Fees					
Course Fee	\$257.20		\$257.20		
Capital Improvement Fee	\$15.75		\$15.75		
SGA Fee	\$4.20		\$4.20		
Total Tuition and Fees					
In-State	\$392.15		\$392.15		
Graduate - Price Group 1					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$261.95		\$261.95		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$417.70		\$417.70		
Graduate - Price Group 2					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$301.35		\$301.35		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$457.10		\$457.10		
Graduate - Price Group 3					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$334.05		\$334.05		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$489.80		\$489.80		

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

IN-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Housing ²					
Peabody Hall/Bowditch Hall		\$4,475.00		\$4,475.00	\$8,950.00
Marsh Hall		\$4,982.50		\$4,982.50	\$9,965.00
Bates Complex - Double		\$5,050.00		\$5,050.00	\$10,100.00
Bates Complex - Single		\$5,435.00		\$5,435.00	\$10,870.00
Atlantic Hall - Double		\$5,527.50		\$5,527.50	\$11,055.00
Atlantic Hall - Single		\$6,165.00		\$6,165.00	\$12,330.00
Viking Hall - Double		\$5,092.50		\$5,092.50	\$10,185.00
Viking Hall - Single		\$5,397.50		\$5,397.50	\$10,795.00
Viking Hall - Double Suite		\$5,202.50		\$5,202.50	\$10,405.00
Viking Hall - Single Suite		\$5,507.50		\$5,507.50	\$11,015.00
Meal Plans					
Commuter Meal Plan ³		\$399.00		\$399.00	\$798.00
Resident Meal Plan ⁴		\$399.00		\$399.00	\$798.00
10-Meal Plan		\$1,738.00		\$1,738.00	\$3,476.00
14-Meal Plan ⁵		\$1,886.00		\$1,886.00	\$3,772.00
19-Meal Plan		\$1,973.00		\$1,973.00	\$3,946.00
Miscellaneous Fees					
Mass PIRG Fee (waivable each semester) ⁶		\$10.00		\$10.00	\$20.00
Resident Parking (Atlantic and Peabody lots)		\$275.00		\$275.00	\$550.00
Resident Parking (Bates lot)		\$250.00		\$250.00	\$500.00
Resident Parking (Marsh lot)		\$200.00		\$200.00	\$400.00
Commuter Parking		\$82.50		\$82.50	\$165.00
International Student Fee ⁷		\$375.00		\$375.00	\$750.00
Records Fee-for non-matriculated students		\$10.00		\$10.00	\$20.00

Online courses (undergraduate) per credit ⁸					\$50.00
Health Insurance -- (waivable) ⁹					\$2,985.00
Matriculation Fee -- new matriculated students (one-time)					\$250.00
Differential Fees for Undergraduate Programs					
Art ¹¹		\$125.00		\$125.00	\$250.00
Biology ¹⁰		\$250.00		\$250.00	\$500.00
Chemistry ¹¹		\$250.00		\$250.00	\$500.00
Communications ¹¹		\$125.00		\$125.00	\$250.00
Computer Science ¹¹		\$250.00		\$250.00	\$500.00
Dance ¹¹		\$125.00		\$125.00	\$250.00
Education ¹⁰		\$125.00		\$125.00	\$250.00
Geography (including Cartography) ¹¹		\$250.00		\$250.00	\$500.00
Geology ¹¹		\$250.00		\$250.00	\$500.00
Music ¹¹		\$125.00		\$125.00	\$250.00
Nursing ¹⁰		\$500.00		\$500.00	\$1,000.00
Social Work ¹⁰		\$125.00		\$125.00	\$250.00
Theatre (BA and BFA) ¹¹		\$125.00		\$125.00	\$250.00
Cohort Based Program Cost					
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2017 Cohort per credit ¹²					\$470.00
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2018 Cohort per credit ¹²					\$525.00

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

NOTES:

- 1 The University Fee represents the fee anticipated for 2018-19. Fees may change by action of the Board of Trustees.
- 2 Housing rates include (1) \$20 per semester/\$40 per year Residence Hall Association Fee for all residence halls; and (2) \$305 per semester/\$610 per year Technology/Student Fee for Bates (Double); \$362.50 per semester/\$725 per year Technology/Student Fee for Atlantic Hall (double), Marsh Hall and Viking Hall; \$400 per semester/\$800 per year Technology/Student Service Fee for Bowditch, Peabody, Bates (Single) and Atlantic Hall (Single).
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- 6 Charged for all day students each semester. Student may opt out and have fee waived on line.
- 7 Applicable to all matriculated international students with a Salem State-issued visa (excluding ESL students)
- 8 All undergraduate students taking online courses to be charged \$50 per credit
- 9 Charged for all students enrolled in at least 75 percent of a full-time course load. Student may opt out and have fee waived if covered by other health insurance. Fall only prorated charge is \$1,253 and spring only prorated charge is \$1,748.
- 10 Annual additional fees applicable beginning with academic year 2016-17 entrants to the program (incoming or transfers).
- 11 Annual additional fees applicable beginning with academic year 2017-18 new entrants to the program (incoming or transfers)
- 12 Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) is a cohort based program with a charge of \$470 per credit for Summer 2017 entrants. Summer 2018 entering cohort will be \$525 per credit.

All charges are subject to change.



**Schedule of Student Charges
2018-19 Academic Year**

OUT-OF-STATE	Fall 2018		Spring 2019		Academic Year
	Per Credit	Full-Time	Per Credit	Full-Time	Full-Time
Day Undergraduate					
Tuition					
Out-of-State	\$293.75	\$3,525.00	\$293.75	\$3,525.00	\$7,050.00
Fees					
University Fee ¹	\$421.60	\$5,059.20	\$421.60	\$5,059.20	\$10,118.40
Capital Improvement Fee	\$15.45	\$185.40	\$15.45	\$185.40	\$370.80
SGA Fee	\$4.20	\$50.40	\$4.20	\$50.40	\$100.80
Total Tuition and Fees					
Out-of-State	\$735.00	\$8,820.00	\$735.00	\$8,820.00	\$17,640.00

Evening Undergraduate (SCPS)					
Tuition					
Out-of-State	\$285.00		\$285.00		
Fees					
Course Fee	\$257.20		\$257.20		
Capital Improvement Fee	\$15.75		\$15.75		
SGA Fee	\$4.20		\$4.20		
Total Tuition and Fees					
Out-of-State	\$562.15		\$562.15		

(1) International Students - Supplemental Charge - \$140 per credit

Graduate- Price Group 1					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$261.95		\$261.95		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$507.70		\$507.70		

Graduate - Price Group 2					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$301.35		\$301.35		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$547.10		\$547.10		

Graduate - Price Group 3					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$334.05		\$334.05		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$579.80		\$579.80		

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

OUT-OF-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Housing ²					
Peabody Hall/Bowditch Hall		\$4,475.00		\$4,475.00	\$8,950.00
Marsh Hall		\$4,982.50		\$4,982.50	\$9,965.00
Bates Complex - Double		\$5,050.00		\$5,050.00	\$10,100.00
Bates Complex - Single		\$5,435.00		\$5,435.00	\$10,870.00
Atlantic Hall - Double		\$5,527.50		\$5,527.50	\$11,055.00
Atlantic Hall - Single		\$6,165.00		\$6,165.00	\$12,330.00
Viking Hall - Double		\$5,092.50		\$5,092.50	\$10,185.00
Viking Hall - Single		\$5,397.50		\$5,397.50	\$10,795.00
Viking Hall - Double Suite		\$5,202.50		\$5,202.50	\$10,405.00
Viking Hall - Single Suite		\$5,507.50		\$5,507.50	\$11,015.00
Meal Plans					
Commuter Meal Plan ³		\$399.00		\$399.00	\$798.00
Resident Meal Plan ⁴		\$399.00		\$399.00	\$798.00
10-Meal Plan		\$1,738.00		\$1,738.00	\$3,476.00
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- 11 Annual additional fees applicable beginning with academic year 2017-18 new entrants to the program (incoming or transfers)
- 12 Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) is a cohort based program with a charge of \$470 per credit for Summer 2017 entrants. Summer 2018 entering cohort will be \$525 per credit.

All charges are subject to change.

Fees below pertain to those courses offered by the School of Continuing and Professional Studies and School of Graduate Studies

Course fees	Range
Lab fees	\$25 - \$500 per course
Clinical Fees	\$15 - \$100 per course
Nursing Resource Center Fee	\$100 per course
Field Placement Fee for MSW courses (currently)	\$100 - \$250 per course
Institute Fee	\$100 per institute

Below are miscellaneous fees and fines that pertain to specific situations as noted**Application Fees**

Undergraduate Admissions	\$50
Graduate Admissions	\$50/online/\$100 paper
Comprehensive Exam Application-Graduate School	\$50

Parking fines

Various violations	\$25 - \$125 per violation
Violation Appeal Fee if appeal not granted	\$5 per violation

Late fees

Late application for degree (undergraduate and graduate)	\$50
Late payment (tuition and fees)	\$50/month
Payment plans (enrollment fee from TMS)	\$40/semester
Non-credit course fee	varies depending on course
Institutes (wintersession/summer)	varies depending on course

**Salem State University
FY 2019 Tuition and Fees
Graduate**

<u>Approved (AY 2019)</u>	
GRADUATE	
Price Group 1	3% Course Fee increase
Massachusetts Residents	
Per Credit	\$417.70
Per Course (3 credits)	\$1,253.10
Out of State Residents	
Per Credit	\$507.70
Per Course (3 credits)	\$1,523.10
International Student Fee Charge (per semester)	\$375.00
Price Group 2	6% Course Fee increase
Massachusetts Residents	
Per Credit	\$457.10
Per Course (3 credits)	\$1,371.30
Out of State Residents	
Per Credit	\$547.10
Per Course (3 credits)	\$1,641.30
International Student Fee Charge (per semester)	\$375.00
Price Group 3	8% Course Fee increase
Massachusetts Residents	
Per Credit	\$489.80
Per Course (3 credits)	\$1,469.40
Out of State Residents	
Per Credit	\$579.80
Per Course (3 credits)	\$1,739.40
International Student Fee Charge (per semester)	\$375.00

Note: The rates above include Tuition, Course Fee, and Capital Improvement Fee.

**Salem State University
FY 2019 Tuition and Fees
Continuing Education**

	<u>Current (AY 2018)</u>	<u>Proposed (AY 2019)</u>
Continuing Education		
Fall and Spring		4% Course Fee increase
Massachusetts Residents		
Per Credit	\$381.17	\$392.15
Per Course (3 credits)	\$1,143.51	\$1,176.45
Out of State Residents		
Per Credit	\$551.17	\$562.15
Per Course (3 credits)	\$1,653.51	\$1,686.45
International Student Supplemental Charge (per credit)	\$140.00	\$140.00
	<u>Summer 2018</u>	<u>Summer 2019</u>
Summer		4% Course Fee increase
Massachusetts Residents		
Per Credit	\$318.00	\$327.35
Per Course (3 credits)	\$954.00	\$982.05
Out of State Residents		
Per Credit	\$453.00	\$462.35
Per Course (3 credits)	\$1,359.00	\$1,387.05
International Student Supplemental Charge (per credit)	\$140.00	\$140.00

Note 1: The rates above for Fall and Spring include Tuition, Course Fee, Capital Improvement Fee, and SGA Fee.

Note 2: The rates above for Summer include Tuition, Course Fee, and Capital Improvement Fee.

Appendix IV

Salem State University Graduate Price Groups

Program	Program
Price Group 1	Price Group 2
Master's Programs	Master's Programs
English (MA)	Behavior Analysis (MS)
History (MA)	Counseling (MS)
Education - Master's Programs	Criminal Justice (MS)
Art (MAT)	Geo-Information Science (MS)
Chemistry (MAT)	Industrial/Organizational Psychology (MS)
Early Childhood Education (MEd)	Mathematics (MS)
Elementary Education (MEd)	Social Work (MSW)
English (MA/MAT)	Education - Master's Programs
English (MAT)	Higher Education in Student Affairs (MEd)
English to Speakers of Other Languages (ESOL) (MAT)	School Counseling (MEd)
History (MAT)	Education - Licensure Only Programs
Leadership in Physical Education & Movement Studies (MEd)	School Adjustment Counselor (Initial Licensure Only)
Library Media Studies (MEd)	School Counseling
Mathematics (MAT)	Graduate Certificate Programs
Middle School Education (MEd)	Applied Behavior Analysis
Middle School Math (MAT)	Clinical Trial Management
Physical Education (MAT)	Computer Science
Reading (MEd)	Counseling
Secondary Education (MEd)	Geo-Information Science
Spanish (MAT)	Sport Development and Management
Special Education (MEd)	
Education - Licensure Only Programs	Price Group 3
Early Childhood Education	Master's Programs
Elementary Education	Accounting (MS)
English to Speakers of Other Languages (ESOL)	Business Administration (MBA)
Mathematics	Nursing (MSN)
Middle School Education (Initial Licensure Only)	Occupational Therapy – Direct Entry (MS)
Reading	Occupational Therapy (MS)
Special Education	Graduate Certificate Programs
Graduate Certificate Programs	Business
Autism Spectrum Disorders	Financial Planning
Digital Studies	Nursing Education
Global Policy Analysis	
Holocaust and Genocide Studies	
Public History	
Public Policy and Administration	
Strategic Communications	
Teaching English to Speakers of Other Languages	
Writing and Rhetoric Studies	
Teacher Leadership	
Certificate of Advanced Graduate Study (CAGS)	
Educational Leadership	

SALEM STATE UNIVERSITY
PRESIDENT’S RECOMMENDATIONS
FOR THE ACTION OF THE ACADEMIC AFFAIRS AND STUDENT LIFE COMMITTEE

Tenure Recommendations:

Chene, Douglas	Associate Professor Accounting & Finance	Effective: 9/1/18
Melendez, Michael	Professor Social Work	Effective: 9/1/18
Yakes, Christopher	Associate Professor Mathematics	Effective: 9/1/18

SALEM STATE UNIVERSITY
PRESIDENT'S RECOMMENDATIONS
FOR THE ACTION OF THE ACADEMIC AFFAIRS AND STUDENT LIFE COMMITTEE

Tenure with Promotion Recommendations:

El-Sherif, Jennifer	From: Assistant Professor To: Associate Professor Sport and Movement Science	Effective: 9/1/18
Gawrys, Carol	From: Assistant Professor To: Associate Professor Nursing	Effective: 9/1/18
Lukens, Jonathan	From: Assistant Professor To: Associate Professor Social Work	Effective: 9/1/18
Minett, Amy Jo	From: Assistant Professor To: Associate Professor English	Effective: 9/1/18
Oliver, Steven	From: Assistant Professor To: Associate Professor Secondary and Higher Education	Effective: 9/1/18
Rodrigue, Tanya	From: Assistant Professor To: Associate Professor English	Effective: 9/1/18
Schreiner, Sheila	From: Assistant Professor To: Associate Professor Biology	Effective: 9/1/18

SALEM STATE UNIVERSITY
PRESIDENT'S RECOMMENDATIONS
FOR THE ACTION OF THE ACADEMIC AFFAIRS AND STUDENT LIFE COMMITTEE

Promotion Recommendations:

Abboud, Geroge	From: Associate Professor To: Full Professor Sport and Movement Science	Effective: 9/1/18
Ackerman, Margaret	From: Assistant Professor To: Associate Professor Nursing	Effective: 9/1/18
Benton, Robin	From: Assistant Professor To: Associate Professor Sport and Movement Science	Effective: 9/1/18
Kasman, Reva	From: Associate Professor To: Professor Mathematics	Effective: 9/1/18
MacLachlan, Jean	From: Associate Professor To: Professor Occupational Therapy	Effective: 9/1/18
Manago, Saverio	From: Associate Professor To: Professor Marketing & Decision Sciences	Effective: 9/1/18
Rocca, Anna	From: Associate Professor To: Professor World Languages and Cultures	Effective: 9/1/18
Slayter, Elspeth	From: Associate Professor To: Professor Social Work	Effective: 9/1/18
Williams, Cheryl	From: Assistant Professor To: Associate Professor Nursing	Effective: 9/1/18
Young, Stephenie	From: Associate Professor To: Professor English	Effective: 9/1/18
Zoppel, Carol	From: Associate Librarian To: Librarian	Effective: 9/1/18

SALEM STATE UNIVERSITY
 PRESIDENT'S RECOMMENDATIONS
 FOR THE ACTION OF THE ACADEMIC AFFAIRS AND STUDENT LIFE COMMITTEE

Emeritus Status Recommendations:

Burnett, Paula	From: Associate Professor To: Associate Professor Emerita Nursing	Effective: 9/1/18
Campbell, Charlene	From: Professor To: Professor Emerita Nursing	Effective: 9/1/18
Case, Susan	From: Professor To: Professor Emerita Biology	Effective: 9/1/18
Elia, Richard	From: Professor To: Professor Emeritus (posthumous) English	Effective: 9/1/18
Fowler, R. Clarke	From: Professor To: Professor Emeritus Childhood Education and Care	Effective: 9/1/18
Glickman, Helen	From: Associate Professor To: Associate Professor Emerita Social Work	Effective: 9/1/18
Hanson, Lindley	From: Professor To: Professor Emerita Geological Sciences	Effective: 9/1/18
Jensen, Marie	From: Professor To: Professor Emerita Nursing	Effective: 9/1/18
Mallick, Krishna	From: Professor To: Professor Emerita Philosophy	Effective: 9/1/18

SALEM STATE UNIVERSITY
PRESIDENT'S RECOMMENDATIONS
FOR THE ACTION OF THE ACADEMIC AFFAIRS AND STUDENT LIFE COMMITTEE

Matchak, Stephen	From: Professor To: Professor Emeritus Geography	Effective: 9/1/18
Shea, Sheila	From: Assistant Professor To: Assistant Professor Emerita Computer Science	Effective: 9/1/18
Weinstein, Marcia	From: Professor To: Professor Emerita Psychology	Effective: 9/1/18

SALEM STATE UNIVERSITY
PRESIDENT'S RECOMMENDATIONS
FOR THE ACTION OF THE ACADEMIC AFFAIRS AND STUDENT LIFE COMMITTEE

Terminal Contract Recommendations:

Salgado, Jose

Associate Professor
Secondary and Higher Education

Effective: 9/1/18

2017-2018 Executive Summary

Presidential Review: Salem State University, President John D. Keenan

Presidential Review Committee

Robert Lutts, chair

Teresa Chisholm, trustee

Mary DeSimone, trustee

I. The Review Process

The 2017-2018 annual review process began with a charge from the board chair to the Presidential Review Committee to produce a report to be considered for a vote by the board at its regular meeting on June 6, 2018. The Presidential Review Committee established the criteria for review, clarified the protocol for completion of the review, and determined the timeline of meetings required in order to submit the review by the deadline of June 30, 2018. While the Department of Higher Education guidelines on presidential evaluations do not require a formal evaluation of a president who has been in office for less than one full year, the board of trustees agreed to conduct a post-transition assessment of President Keenan's eight months in the position to review his progress to date.

The committee examined the president's performance in two broad areas: the specific goals set forth by Salem State University and the performance of the university against system-wide goals. In addition to focusing on the "Big Three" Statewide Priority Objectives, the system-wide goal evaluation looked at campus safety and violence prevention and increasing diversity in leadership positions. The assessment of John D. Keenan's Presidential Initial Review and the analysis of relevant data has demonstrated a strong and effective transition period over the past eight months. The report highlights an excellent understanding of the challenges the university faces over the coming years. President Keenan's report demonstrates a keen understanding of the goals of both the Board of Higher Education and the goals set by the board of trustees at Salem State University.

II. The Performance Data to Support Conclusions and Recommendations

Performance data are embedded within each section of this document. Additional supporting materials are listed in Section V. Individual documents are attached to John D. Keenan's Presidential Initial Review 2017-2018.

III. Summary Statement

The board of trustees recognizes that President Keenan has completed a thorough self-evaluation focused on his transition to the position of president and the specific goals for this year. The Presidential Review Committee is impressed with the depth of understanding that President Keenan has demonstrated of the challenges the university is facing. Declining enrollments, expanding expenses for faculty, and overhead benefits costs are creating a difficult financial environment. President Keenan presents this situation very clearly in a graph of enrollment and total faculty and staff expenses in his summary report (page 13, John D. Keenan's Presidential Initial Review 2017-2018). Another example of President Keenan's understanding of the significance of these issues was his announcement on May 8, 2018, that

the university would implement a hiring freeze to prompt a financial adjustment as a result of softer than projected enrollment numbers for AY 2018-2019. The committee appreciates in these challenging times of declining demographics the president's prudent pause to be intentional in the allocation of restrained resources. The committee understands that eight months is far too short a period of time to provide an in depth assessment of performance in the position. Nevertheless, the committee is certain that President Keenan is off to a strong start. He has made a few key staff changes and succeeded in retaining all major leadership positions in the first six months. He has conducted a number of introductory meetings with faculty and has used these meetings as an opportunity to communicate the challenges and opportunities that the university is facing.

We are hopeful that this open communication approach is effective at gaining buy-in for the strategies President Keenan is implementing. We are confident that President Keenan is setting the groundwork for a strong working relationship with the faculty and staff of the university. We believe President Keenan is presenting a clear set of goals and is pursuing a collaborative effort to engage faculty and staff.

A. Institutional Goals

AY 2017-2018 Goals and Priorities

- Completing Strategic Plan (2017-2021) and gaining approval by the Board of Higher Education
- Preparing and presenting proposal for the Science Teaching Laboratory Addition (STLA) to Baker Administration
- Completing Campus Climate Survey and rolling out results to campus community
- Transitioning into presidential role

President Keenan has successfully completed his AY 2017-2018 goals and has set clear and measurable goals for the upcoming AY 2018-2019. These priorities are itemized below. We have seen many programs and initiatives launched with the objective of helping achieve these goals. We believe these goals are aligned with the system-wide priority objectives set forth by the Board of Higher Education.

We have been impressed with President Keenan's approach to utilizing the information obtained from the Campus Climate Survey to demonstrate areas of concern and use this information to help create a positive and inclusive environment throughout the university. Culture is created at the top. President Keenan and his staff are setting a good example for the university to follow. A healthy culture of inclusion is a goal that is highly valued by President Keenan and his staff.

AY2018-2019 Goals and Priorities

- Increase enrollment +100 students
- Obtain funding for STLA
- Initiate/plan new comprehensive fundraising campaign
- Increase additional auxiliary revenues (summer housing)
- Gain approval of Occupational Therapy Doctorate (clinical)
- Gain approval of our BS in IT
- Evaluate "online" initiatives/collaborations

- Seek “control” of strategic Canal Street properties
- Hire a new permanent VP for Diversity and Inclusion
- Build on our concerted efforts to increase faculty of color
- Continue making positive gains toward closing achievement gaps
- Draft Cat Cove business plan and evaluate private collaborations.

B. System-Level Goals

Salem State University continues to be guided by the tenets and the goals set forth by the Board of Higher Education. The following details highlight data points in each of the “Big Three” Statewide Priority Objectives:

Access – President Keenan is developing a plan to enhance the community college channel to the university. He is developing specific programs to grow and expand access to the university. President Keenan is working closely with the Black, Brown, and Proud group and the Student Government Association to insure the university is encouraging proper communication to foster greater student access with all groups in the university.

Closing Achievement Gaps - The near term goals and longer term goals clearly are aimed at enhancing the success of students all across the university. This should be a strong step toward closing achievement gaps.

College Completion/Success – Over the past decade the university has improved substantially the time period in which students graduate and the graduation completion rates. President Keenan is aiming to continue to improve on these statistics. We do recognize that completion statistics can be at odds with the goal of improving access. If we grow the number of students attending our programs, we may be expanding into a group of students that may take longer to graduate. This may mean some of these goals may be in conflict with each other (access versus completion). We believe President Keenan is well aware of these issues and will do what is best for all students at our institution.

C. Campus Safety and Violence Prevention

President Keenan has worked closely with Assistant Vice President for Public Safety and Risk Management Gene Labonte and Vice President for Finance and Facilities Karen House to place a high priority on safety throughout the university. The campus has successfully implemented the Department of Higher Education’s best practices for campus safety and violence prevention through online and in person trainings. In addition, the university has an active Care and Concern Team, Prevention Task Force, and Prevention Education Advocacy Response (PEAR) program; launched a Bias Response Team; reviewed its emergency preparedness and expressive activities policies; and launched the Rave Guardian mobile application with the campus community this academic year. The board is confident that the university is addressing campus safety and violence prevention.

The results of the Campus Climate Survey (conducted in Spring 2017) were presented to the campus in early November. The report was extremely useful in identifying the needs on campus and issues that must be addressed. President Keenan appointed a Climate Survey

Implementation Team (CSIT) and charged them with reviewing the data and working with the university community to implement strategies that improve the campus climate. We were pleased that President Keenan involved the board in the roll-out of survey results. This initiative remains a priority for his administration as well as for the board of trustees.

D. Increasing Diversity in Leadership Positions

President Keenan has made key appointments to his leadership team that demonstrate a commitment to diversity in administrative management. With the departure of the inaugural vice president for inclusive excellence in the fall, President Keenan appointed interim co-chief diversity and inclusion officers to complete the current academic year. They have done an excellent job of stewarding this office during a period of transition. One of these individuals has been appointed for the next academic year and the university is actively working toward recruitment of a permanent vice president.

One emerging trend from the Campus Climate Survey results was a need to increase hiring and retention of faculty and staff from culturally diverse backgrounds. To address this matter, the CSIT is planning to draft a five-year plan to increase diverse faculty and staff on campus. The Human Resources and the Inclusive Excellence offices now conduct equity reviews for all employment searches and this year offered several professional development and training opportunities focused on cultural competency, diversity, and inclusion.

IV. Recommendation for Compensation Adjustment

The Department of Higher Education advises that newly appointed presidents are not eligible for compensation adjustments during their first year status. As such, the board will not make a recommendation for a compensation adjustment as part of the 2017-2018 review process.

V. Supporting materials: charts, graphs, and/or data

John D. Keenan's Presidential Initial Review 2017-2018 and Appendices

- A. Presidential Leadership Profile
- B. Inauguration Address of John D. Keenan
- C. Assessment of Campus Climate Executive Summary
- D. Strategic Plan
- E. Science Teaching Laboratory Addition

John D. Keenan's Presidential Review Addendum

Black, Brown, and Proud Update



John David Keenan, JD

Presidential Initial Review

August 6, 2017 – April 15, 2018

April 15, 2018

TABLE OF CONTENTS



Introduction	2
Top Priorities for the First Year	4
Campus Climate Results	4
Strategic Plan Approval	4
Science Teaching Lab Addition (STLA)	6
Board of Higher Education Priorities – Progress on the Big Three	6
Access	6
Closing Achievement Gaps	8
Completion/Success	9
Progress on Our Strategic Plan	12
Conclusion & AY 2018-2019 Goals and Priorities	22
Exhibits	
President Leadership Profile	A
Inauguration Address of John D. Keenan	B
Assessment of Campus Climate Executive Summary	C
Strategic Plan	D
Science Teaching Laboratory Addition	E

INTRODUCTION

While the Department of Higher Education does not require a presidential review during the first year a president takes office, I fully agree with the Board of Trustees (BOT) that it makes sense to review my initial performance and, more importantly, set goals for AY2018-2019. At the February 7, 2018, BOT meeting, Chair Paul Mattera appointed Trustees Rob Lutts, Teresa Chisholm and Midge DeSimone as the Presidential Review Committee (PRC).

Transition to the Presidency:

With my confirmation as candidate on June 20, 2017 (BHE vote), I was extremely fortunate to have extensive overlap with outgoing President Pat Meservey (see attached Exhibit A, Presidential Leadership Profile). President Meservey and I met regularly for the several weeks prior to her retirement on August 5, 2017. President Meservey transferred all outstanding matters relative to the administration of the office. I was honored to be able to formally introduce my vision for Salem State to the campus, local, and regional community at my inauguration on January 19, 2018 (see attached Exhibit B, Inaugural Address).

Transfer of relationships:

With this presidential transition coming on the heels of an extremely successful comprehensive campaign, it was critically important to make sure the “handing off” of relationships with key stakeholders was seamless. We spent most of the summer and the early fall engaging with the campus community, community college leaders, civic leaders/elected officials, donors, business and community partners, and peers in higher education. Campus community conversations included one-on-one meetings with members of the Board of Trustees, a listening tour with faculty from each school, meetings with union leadership, the Student Government Association and more. In addition to in-person meetings, former President Meservey, Institutional Advancement Vice President Cynthia McGurren, Institutional Advancement AVP Cheryl Crouse, and I thoroughly reviewed all active supporters and identified potential future donors as well. I am confident these transitional conversations went well. Indeed, I believe this relationship building aspect of the position is one of my greatest strengths. It is truly a pleasure to meet and work with such passionate supporters of Salem State.

Building the team:

As I've said many times, I was extremely fortunate to inherit from President Meservey an exceedingly strong and talented senior team. As an internal candidate, I had the good fortune of working with all members on the senior team through the President's Executive Council (PEC). I had been completely transparent with my peers regarding my intent to seek the presidency. Once I was selected and confirmed as President, I had individual meetings with each member of the PEC to ascertain their plans. Here again, I am proud to report not a single member of the senior team decided to leave because of the transition. Chief of Staff Beth Bower advised me of her desire to retire; however, she was agreeable to stay on for a few extra months to assist with my transition. Thankfully, President Meservey's internal team, Adria Leach, Katie Sadowski, Lynne Montague, Nicole Giambusso, and Kim Burnett also remained.

Without hesitation, I knew who could fill the role of my new Chief of Staff. Nate Bryant, alumnus, had proven himself an asset to Salem State time and time again over the course of his more than two decades of service. Through many different roles (admissions and advising) and in leading both the Strategic Planning Committee and 10,000 Reasons Campaign (on campus), Nate had the respect of the entire campus. Moreover, as a resident of Salem and former school committee member, he had the local contacts and instincts to assist with "town – gown" relations.

With Nate in place, I quickly reaffirmed the other PEC members' commitments to stay in place. Appreciating the value of having a general counsel on campus, I also decided to fill the vacancy I had left. Through a competitive search process lead by Nate, we were fortunate to recruit an experienced public higher education attorney. Rita Colucci joined us in December after having served at Framingham State University for over a decade in many capacities including Director of Human Resources, Chief of Staff to the President, and General Counsel.¹ I promoted Scott James to Executive Vice President and assigned him the additional responsibilities of Human Resources and Information Technology. I also re-united Facilities with Finance under Chief Financial Officer Karen House. With the full team in place, we were ready to go!

¹ I think it is also important to note that I was fully transparent with FSU President Javier Cevallos and worked out a smooth transition so that he was not left without counsel.

Top Priorities for the first year

Having been a member of the PEC since 2014, I was aware of the priorities for my first few months in office: completing the **Strategic Plan** (2017-2021) and gaining Board of Higher Education (BHE) approval; preparing and presenting our proposal for the new **Science Teaching Lab Addition (STLA)** to the Baker Administration; and completing our **Campus Climate Survey** and rolling out the results to campus. We restructured Beth Bower's position to take the lead on completing the Strategic Plan and finalizing our STLA proposal. Beth was also assigned to assist former Vice President for Diversity and Inclusion, Lisa McBride with rolling out the campus climate survey results.

a. Campus Climate Results

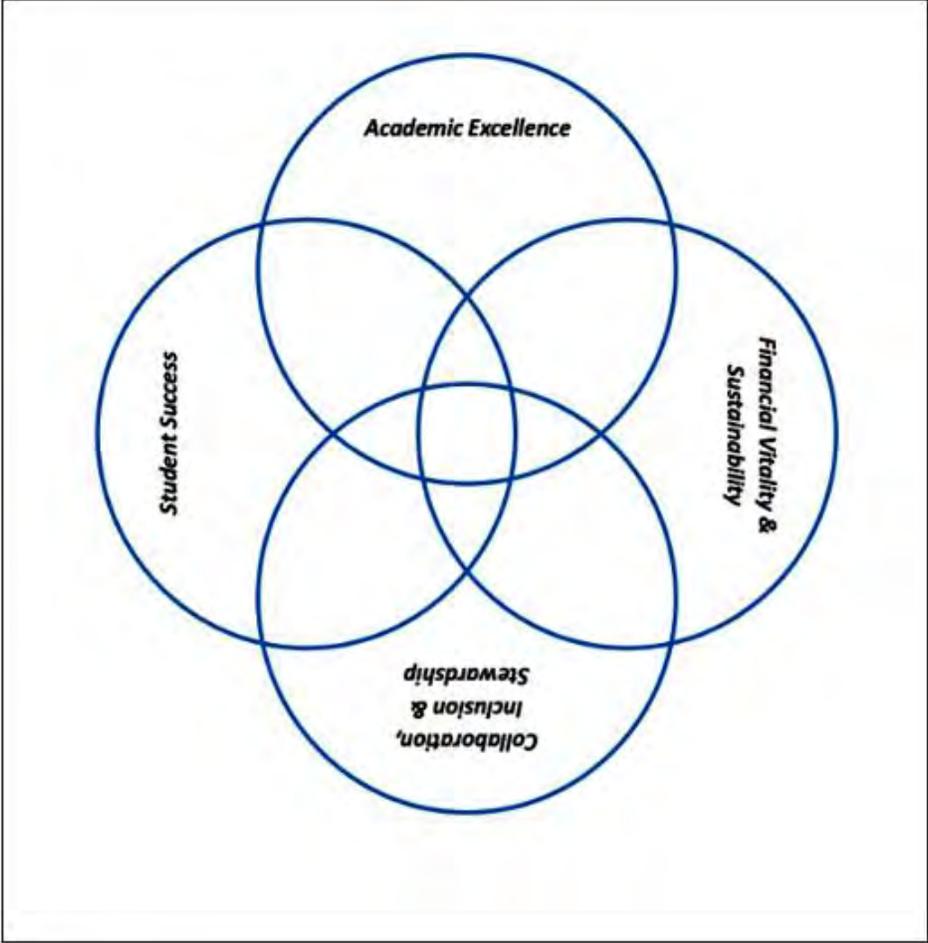
In November, we invited Dr. Susan Rankin to campus to help present the findings from our Campus Climate Survey, through a series of discussions with the campus community (see attached Exhibit C, Executive Summary). VP McBride assisted with this roll out and departed shortly thereafter. With VP McBride's departure, we filled the role with interim co-chairs Rebecca Comage and Professor Michael Mobley. They have assisted with the smooth transition and have helped me address some of the data driven change efforts recommended by Dr. Rankin including, enhancing the cultural competency for student faculty and staff and assessing the long-term role of the office.

b. Strategic Plan Approval

At the December 5, 2017, Strategic Planning Subcommittee of the BHE, I successfully presented and defended our proposed Strategic Plan, which was unanimously approved and recommended to the full BHE (see attached Exhibit D, Strategic Plan). On December 12, 2017, the full BHE also unanimously approved the plan. Provost Silva, Chief of Staff Bryant, and I also met with Secretary Peyser, Commissioner Santiago, and Tom Moreau to discuss implementation and assessment of the plan. While it has been suggested that Secretary Peyser has final sign-off authority on the plan, we feel that it is important to proceed as approved. We are working with our Collaboration Committee on both implementation and monitoring of our progress.

The Collaboration Committee, an advisory committee of administrators and faculty, was convened in 2016 to facilitate an inclusive process for collecting the campus community ideas and recommendations and distilling them into a four-year plan. The Committee led an intense and inclusive outreach process to ensure key stakeholders would have multiple opportunities to provide input to assure a shared vision and goals. During the fall of 2016, the SSU community participated in well over 2,000 touchpoints and engagement opportunities.

Dean Cambone (School of Education) recently described our strategic plan goals as inextricably linked – each being equally reliant on the other for success. I believe his Venn Diagram (below) simply and exquisitely displays our inherently related tasks. Ideally, four years hence, we will be able to report “mission accomplished” on all fronts.



c. Science Teaching Lab Addition (STLA)

In December, we finalized our proposal for the STLA and submitted the requisite supporting application and materials (see attached Exhibit E, STLA Summary). Prior to submission, I participated in our peer review presentation, which enabled us to improve our proposal in accordance with the new framework and guidelines. In recently speaking with Division of Capital Asset Management and Maintenance Commissioner Carol Gladstone, it is my understanding that their recommendation(s) have been forwarded to Administration and Finance for review. Presently, we are in full court press advocacy mode. Our North Shore Legislative Delegation has sent a letter of support to Governor Baker and Secretaries Peysner, Ash, and Heffernan. Senator Lovely and Representative Tucker are also arranging meetings with Governor Baker and Secretary Heffernan.

Progress on the DHE Big Three

a. Access

Salem State is committed to advancing access to college and addressing the cost problem in higher education. We have enthusiastically collaborated on Department of Higher Education access initiatives including: Transfer Pathways; STEM Policy; State University Transfer Principles; Commonwealth Commitment; Mass Colleges Online; and Dual Enrollment. Our collaboration with the community colleges has increased as Admissions visited community colleges more for transfer advising. We have established an Early College initiative with Salem High School and are in preliminary talks to extend the program to Lynn Public Schools. We have implemented financial literacy programs, enhanced financial aid messaging, and created a financial aid restructuring formula intended to better meet the needs of our low-income students. We have marketed the value and affordability of a Salem State education. Value and affordability are consistent themes emphasized in Admissions communications, marketing materials, and events. The quality and value of a Salem State education is demonstrated to prospective students and families through interactions with accessible, engaged faculty; learning about high quality internship and post-graduate job opportunities. Through comparing the costs of out

of pocket expenses, loans, and post-graduate debt with other institutions, students learn about the value and affordability of attending Salem State. Further, we have streamlined the transfer credit equivalency process and held early transfer registrations. We have been active in statewide recruitment events and providing Book Awards at our feeder high schools to promote access. Admissions created the Executive Director of Partnership Development and Outreach position to strengthen pathways from community colleges, community based organizations and high schools to Salem State.

We continued to expand flexible program options to better accommodate adult learners, including a fully online, ADA compliant graduate certificate in business that will launch in fall 2018.

We offered an innovative BS + Educator Licensure + MEd pathway program that is dramatically less expensive than traditional models and provides students with the opportunity to complete their masters' in an efficient manner.

As we continue to make efforts to enhance the student experience, we engaged in initiatives focusing on programs that improve international student satisfaction and engagement and promote a stronger sense of belonging and community. Highlights of our innovations this year are: International Peer Mentor Program, weekly coffee hours, bi-weekly faculty "cookies and conversation" sessions, apple picking trip in New Hampshire, International Student Association conference and community service planning, Intensive English Language Program collaboration with social work students, a community Thanksgiving dinner, and International Week daily events.

We rolled out a newly created mobile-first, ADA compliant website with the overarching goal of strategically marketing and positioning Salem State to prospective students with the goal of boosting college participation rates. This roll out has resulted in nearly 6.3 million unique viewers since its launch 11 months ago. This total reflects an increase of 1.38 million viewers or +22% more unique viewers than in the prior year. The site's overall analytics have also improved such as a 41% bounce rate which is excellent according to web standards. Moreover, we strengthened our brand presence and increased interest in academic programs

through innovative micro-outreach campaigns to specific audiences, in combination with strategic messaging and content strategies across all modalities. These campaigns support diversity and inclusion goals, reinforce community college partnerships, and educational opportunities for the regional workforce. Our click through rates average 2%; the industry standard is 0.22%.

b. Closing Achievement Gaps

We have doubled down on closing persistent achievement gaps:

- Partnered with MA Charter Schools and community-based organizations (e.g., One Goal, Bottom Line, Inversant) to create a pipeline and support for underserved populations.
- Increased on-the-spot admissions programs with Lynn Classical, Academy of the Pacific Rim, Malden, Revere, Lowell, Salem High School, and Salem Academy Charter School.
- Continued the cohort initiative to actively reach out to students who were not progressing at satisfactory levels and offered academic/financial support.
- Diversity and inclusion training was initiated on campus for faculty, administrators, and staff.
- In fall 2017, a Men of Color Learning Community was established. Eighteen students participated in the inaugural launch, with 100% retention this spring. Additionally, in fall 2017, a Women of Color First Year Seminar was established. Based on its success, a Women of Color Learning Community will be launched in fall 2018.
- Seven members of this Learning Community attended the Black, Brown and College Bound Conference in March. We recently had a positive meeting with a local foundation seeking support to continue this work.
- Continue to establish workforce partnerships to assist in promoting student achievement.
- Expanded peer mentor programs at the Bertolon School of Business to help students navigate academic requirements.
- Created “super” and “transfer” advisors to offer support for our most vulnerable students.

We were extremely proud to be recognized by the Education Trust as one of the top ten institutions closing the achievement gap for Latinx students. We have set an ambitious goal of eliminating the achievement gaps (black-white, Hispanic-white, male-female) for six-year graduation rates over the next four years.

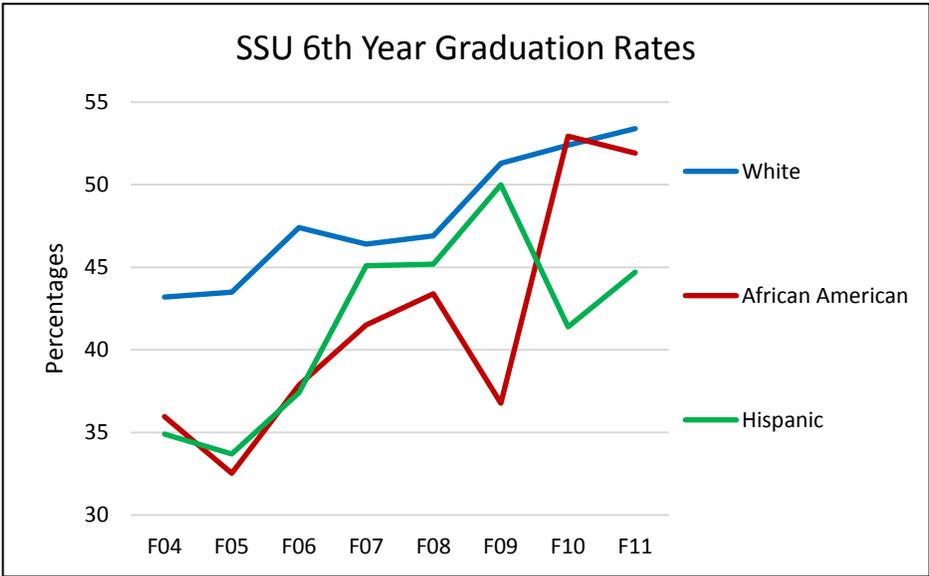
c. Completion/Success

Salem State is committed to increasing graduation and retention rates. We continue to increase the use of data to support evidence based decision making and to inform and evaluate programmatic effectiveness to improve student success. The TRIO, Student Transition and Engagement Program (STEP), and Summer Bridge programs serve an underrepresented student population including first generation, low income (high Pell eligible), racially diverse, and students with learning disabilities. The following are a few of the initiatives that we have created to meet this goal:

- Worked with Institutional Research to begin identifying data sets needed to examine the retention and graduation rates of various student populations.
- Utilized data to share information about student success based on the retention and graduation rates for TRIO and STEP students, which are currently above the averages for the general student population.
- Utilized data from Mapworks to understand student risk and emerging trends based on specific populations.
- First Year Experience (FYE) coordinated individual outreach to first year students several times throughout the year to form institutional connection with students and address issues/concerns.
- To improve college completion rates, we implemented best practices for student success initiatives (e.g., warnings/counseling when dropping a class, streamlined the Satisfactory Academic Progress appeal process).
- The Interdepartmental Collaborative was created bringing together university offices to focus on student progression.
- The add/drop policy was aligned for all students.
- Promoted 15 credits (per semester) to better educate students on the benefits of graduating in four years.
- Completed an internal/external assessment of admissions and financial aid.

- Completed Enrollment Management Operations staff changes to streamline and improve operational services, technology, and collaboration.
- Implemented Apps Anywhere which provides anytime, any device access to academic software.
- Convened a group to look at utilizing Open Educational Resources (OER) to reduce the cost of textbooks for students.

	Sixth Year Graduation Rates							
Student Race/Ethnicity	F04	F05	F06	F07	F08	F09	F10	F11
African American	36.0	32.5	37.9	41.5	43.4	36.8	52.9	51.9
Hispanic	34.9	33.7	37.4	45.1	45.2	50.0	41.4	44.7
White	43.2	43.5	47.4	46.4	46.9	51.3	52.4	53.4



Campus Safety and Violence Prevention (CSVP)

Campus safety and violence prevention remain top priorities. We have implemented the DHE’s best practices for Campus Safety and Violence Prevention with the introduction of (online) Active Shooter Response Training and Preventing Discrimination and Sexual Violence Training. In addition, the Care and Concern team discusses students of concern and protocols with the deans, the Center for Academic Excellence (CAE), FYE, and Disability Services. The Prevention Taskforce

was developed to coordinate efforts; assess effectiveness; recommend tools; and comply with government mandates.

We convened a Bias Response Team to develop and implement a Bias Incident reporting guidance protocol. Chief of Staff Bryant along with Police Chief Labonte convened an Emergency Preparedness, Event policy and Expressive Activities policy review. We have made significant outreach for victims of sexual violence through the Prevention Education Advocacy Response (PEAR) program which is funded by a \$3M Department of Justice grant through 2018. A grant reapplication has been filed for this program.

Campus police procured and have encouraged members of our community to download Rave and the Rave Guardian app (connect users to police with the touch of a button and users can build their own network of guardian alerts). Improvements were also made to video surveillance infrastructure, and e-phones were added to parts of the campus.

We are transferring the management of all study abroad and faculty-led trips to the Center for International Education with the goal of implementing TerraDotta as a travel management platform in AY19 which would significantly enhance the management of study and travel abroad and improve communications.

Increasing Diversity in Leadership Positions

Salem State is committed to seeking academic excellence while continuously striving to be a welcoming, inclusive, and diverse campus. Increasing diversity in leadership positions remains a university priority.

- We have continued to work closely with Black, Brown and Proud (BBP), a student group, regarding their concerns about the office of Inclusive Excellence.
- The Career Ladder initiative offers a transparent view of promotional advancement pathways within ITS and guides professional development investment.

- Human Resources (HR) collaborated with Inclusive Excellence to conduct equity reviews of all employment searches. HR presented a workshop on diversity and inclusion that saw a capacity crowd of 50.
- Inclusive Excellence offered three professional development opportunities to enhance cultural competency; “Culture Coaching: the Power to Transform Leaders and Institutional Climate,” “Anti-Bias and Diversity Training for SSU Police,” and the “Train the Trainer” program.

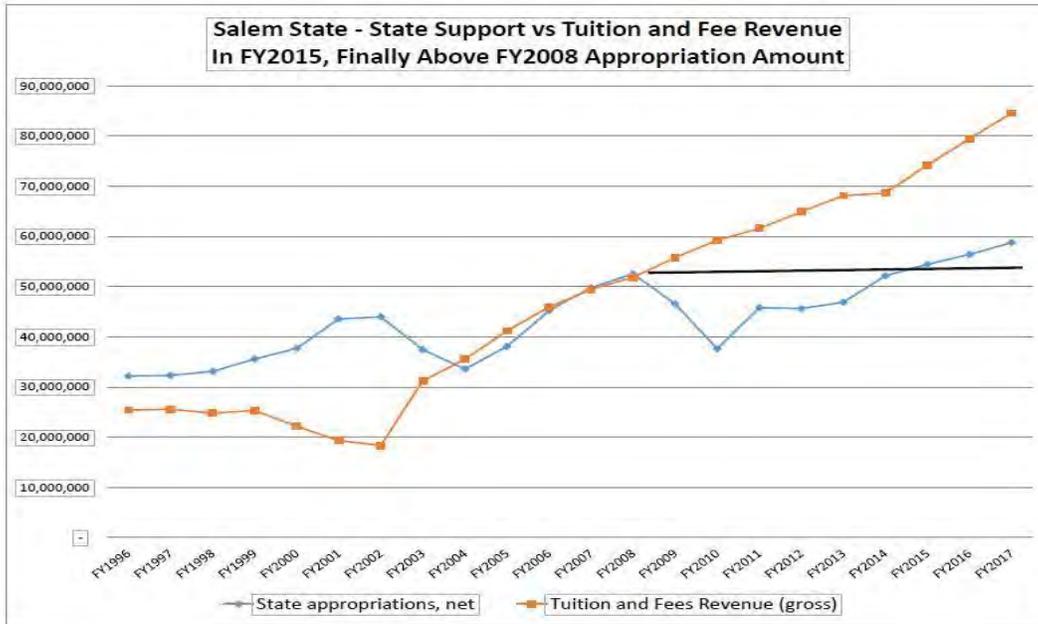
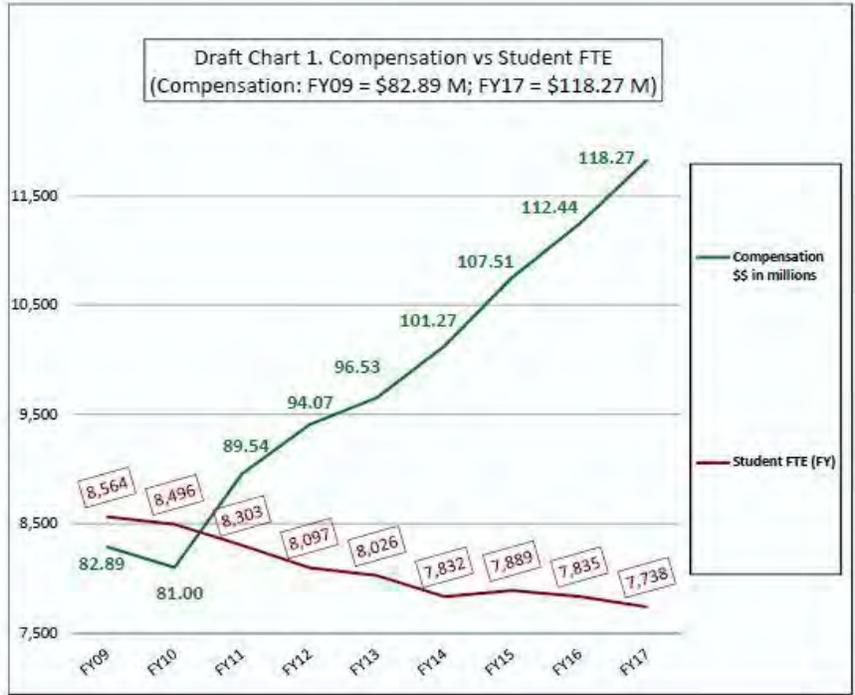
In conjunction, with Board Chair Mattera, we have quite successfully advocated to the Baker Administration to increase Board diversity. Not resting on our laurels where we saw an increase in faculty of color from eight to twenty-three in FY18, we continue to be deliberate in our faculty searches and hope to continue our momentum of increasing the diversity of our faculty for FY19.

Progress on our Strategic Plan

a. Financial Vitality

Our success is dependent on just three words: enrollment, enrollment, enrollment! The charts below depict our challenge – declining enrollment over the past several years, increasing compensation costs and flat state appropriations. We are making every effort to turn this around. If not successful, we will need to reconsider the “true” size of enrollment and make appropriate adjustments to achieve financial vitality.

Draft Chart 1. Total FY Compensation (Salaries/Wages and Fringe Benefits) vs FY Student FTE									
	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
Annual Student FTE	8,564	8,496	8,303	8,097	8,026	7,832	7,889	7,835	7,738
Compensation (\$\$ in millions)	82.89	81.00	89.54	94.07	96.53	101.27	107.51	112.44	118.27



The university's focused enrollment strategy will help to fuel its financial vitality as we continue to turn today's challenges into tomorrow's opportunities.

- Our Marketing and Creative Services department undertook an in-depth analysis of academic programs to determine areas of potential enrollment growth. Studying marketplace degree completion rates, student demand, regional and national job openings, and competitor analysis, produced independent data to guide resource allocations.
- Enrollment Management, Marketing and Creative Services, Center for International Education (CIE) and School of Continuing and Professional Studies (SCPS) collaborated to raise enrollments.
- We implemented a new financial aid leveraging model to provide financial support and increase yield.
- We worked to build a junior, senior strategy to increase inquiries, applications, and admits.
- We enhanced the recruitment and communication strategy to increase applications.
- We have been more intentional in utilizing institutional reports and dashboards as part of our business intelligence and data analytics systems. This reporting and real-time information will become the basis for more informed decision-making.
- Academic Affairs is actively working with enrollment management and marketing to grow student enrollments, particularly adult learners in SCPS. Specific program growth areas include Nurse Practitioner and accelerated Bachelor of Science in Nursing (ABSN), Occupational Therapy (direct entry), Teacher Leadership, and Accounting. In addition, Healthcare Studies and Social Work continue to see increases in enrollment.
- While international enrollments (with 245 F-1 visas and 40 J-1 visa students in 2017) remains a strength versus peer state institutions, our numbers are down significantly since our recent peak (500). We are working to implement Canvas Catalog (an add on to our existing Canvas software) which will greatly facilitate our ability for non-SSU students to take classes.
- A revision to our long-term agreement with Reitaku University in Japan now includes a monetary incentive; we will be welcoming our first 1+2+1 "experimental" cohort from Nanjing Normal University in China this fall, as 14 students become English majors with the option of continuing into our MA

TESOL program; we are finalizing an agreement with Shaanxi Normal University in China to host an intensive two-week teacher training program this summer with the intent of establishing a long-term relationship; we have agreements in discussion with Daito Bunka University in Japan to send students to our Intensive English Language Program and with Shenzhen University in China to also send students to SSU for short-term language/culture programs.

- We successfully obtained a \$40,000 grant from the National Endowment for Humanities (Roopika Risam, English; Susan Edwards, Library) to host leaders from digital humanities programs from other regional comprehensive universities to collaborate on developing a national network of practitioners.
- The university continues to develop strategic revenue building partnerships such as Cat Cove Clam Seedlings and potential Mussel production.
- To increase state and federal grants, we have restructured the area of Sponsored Programs and Research.
- On the heels of our successful 10,000 Reasons Comprehensive Campaign, broad fundraising commitments continue. The total raised to-date: \$1.37million of \$2 million goal for FY18. Major and planned giving grew to \$266,407 for the 50th reunion class (previous average \$44,242).
- Recognizing the need to identify new sources of revenue, we partnered with Capstone On-Campus Management to help us better utilize residence halls and other spaces on campus that remain largely vacant during the summer. This partnership represents an innovative approach to supporting our goal of financial vitality.

b. Collaboration, Inclusiveness and Stewardship – Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship.

My introduction into the presidency came at a time when students across the country began to more vocally; express their concern over the increased incidents of racist and discriminatory acts on college campuses. Salem State was not immune to this as we saw acts of hate (vandalism) on our campus. This prompted me to encourage open and honest conversations about diversity and inclusion from our students, faculty, and staff. I was particularly impressed with our students. They expressed themselves in a manner that made me proud to be their

president and to commit myself to making Salem State a welcoming and inclusive campus. Fortunately, we had already begun a comprehensive campus climate study, beginning with a campus-wide survey. This spring, the Climate Study Implementation Team (CSIT) reviewed the results of the survey and held numerous focus groups to allow further input. I look forward to CSIT presenting their findings to the campus community.

- We are making a concerted effort to increase diversity within the Honors Program by being more intentional in our outreach to students of color. For example, a congratulatory postcard was sent to all first year students of color with a 3.5+ GPA at the end of their first semester. The postcard invited them to attend an informational breakfast and learn about the many benefits of the program.
- The Center for Academic Excellence (CAE) is actively collaborating with all areas within the University to improve/promote student success. For example, CAE staff has been meeting with department chairs to improve collaboration and better meet student and faculty needs.
- Retention services has created liaisons for each academic area, which has resulted in better usage and engagement of Mapworks from faculty and staff.
- Center for Teaching Innovation facilitated several book groups with faculty and staff that focused on racism and microaggressions. Some of the materials used included the following books: *35 Dumb Things Well-Intended People Say* and *Race Talk: the Conspiracy of Silence*.
- The School of Graduate Studies is working with The National Park Service on an MOU. The MOU also includes the Salem Maritime and Saugus Iron Works. This agreement will focus on civic engagement activities for students, faculty, and staff.
- Our mission to increase support for faculty and staff initiatives through private foundations and corporate funding yielded positive results. Some of the initiatives that received private funding include The Upward Bound Program, via the Rogers Family Foundation Grant; Salem High School Mentorship Program, via The Boston Foundation and; The Center for Holocaust and Genocide Studies, via Combined Jewish Philanthropies.

- Launched 16 Crowdfunding projects covering a variety of departments and programs across campus to increase fundraising for designated project. Some of the projects include:
 - Helped the Latin American Student Organization fund their Puerto Rico Community Service Trip over Spring Break
 - Students in the First Year Seminar on Philanthropy raised money for the university's food pantry
 - Endowed the Arlene Greenstein Study Abroad Scholarship which affords qualified SSU students the opportunity to visit another country through short-term or extended experiences. Dr. Greenstein was a former SSU dean.
 - Raised funds for materials for the Vikings Build-A-Bed Challenge – partnership with SSU Center for Civic Engagement, A Bed For Every Child, The Massachusetts Coalition for the Homeless, and St. Jean's Credit Union – where students built 50 beds for children in the North Shore area.
- Institutional Advancement expanded its partnership with Office of Career Services (OCS) to better align corporate partnerships and maximize gift potential.
- Maximizing SSU's investment in the Youth at Risk conference, collaborated with Admissions, Graduate School, Career Services, Alumni Relations, Center for Children and Youth Studies, and Inclusive Excellence.
- Published three print publications; Fall Statement, focusing on 10 years of excellence; Impact, winter donor magazine; and Spring Statement, showcasing the university's entrepreneurship.
- We continue our work with external stakeholders with an emphasis on fund raising, influencing policy, and advancing the reputation of the university. Working with our sister institutions, we advocate for support for public higher education with the administration and legislature, with particular attention to maintaining affordability for our students. We also remain heavily involved with regional business and community partners to generate increased opportunities for our students and faculty within their fields of interest, to better align our programming with the workforce needs of the region, and to advance the region's cultural, social and economic development.

- Many of our faculty and staff serve on boards and committees throughout the region, providing expertise to the business and nonprofit worlds. In my role as president, I share this responsibility by serving on the following boards:
 - Council of State University Presidents
 - Essex County Community Foundation County Leadership Council
 - New England Council
 - Northeast Arc Advisory Board
 - North Shore Advisory Board of the Anti-Defamation League
 - North Shore Alliance for Economic Development
 - North Shore Chamber of Commerce
 - North Shore Workforce Investment Board
 - Salem for All Ages Leadership Council
 - Salem Partnership
 - SSU Assistance Corporation
 - Voices Against Injustice (formerly Salem Award Foundation)

c. Academic Excellence: Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society.

2017-2018 has been a productive year with many advances in Academic Excellence. With the leadership of Provost Silva we introduced several new programs and innovative educational experiences for our students:

- Implementation of self-check tools allowing faculty to check their Canvas courses for ADA compliance in self-paced format.
- Department Class Scheduling will produce adjunct faculty budget projections, personnel costs savings, and streamline course planning.
- Online tracking of adjunct faculty evaluation streamlines the process and increases access.
- The Information Technology Services department is creating a student/faculty hub to showcase and promote academic research.

- New Programs:
 - New programs in School Adjustment Counseling
 - MS in Accounting
 - MS in Athletic Training (BHE recently approved)
 - Online Graduate Certificate in Business (effective fall 2018)
 - Seeking a new Bachelor of Science in Information Technology
 - Working toward a doctoral program in Occupational Therapy
- Innovative Educational Experiences:
 - SSU has been selected to join the Howard Hughes Medical Institute Science Education Alliance's Phage Hunters Advancing Genomics and Evolutionary Science program effective AY19.
 - SSU Library is now a member of the City of Salem's Preservation Partners, a group of local organizations committed to preserving Salem's unique history.
 - SSU was granted a license to hold our first ever TEDxSalemStateUniversity, an event that will be held in September 2018 and will showcase faculty thought-leadership within multiple disciplines.
 - SSU will be hosting the Summer 2018 Project Kaleidoscope meeting of the Massachusetts Region sharing best practices in STEM pedagogy.
 - Summer at Salem State will offer a special series of community events in celebration of the 350th anniversary of The House of the Seven Gables and the literary contributions of Nathaniel Hawthorne.
- Faculty achievements increase our students' educational experiences. A few highlights include:
 - Keja Valens (English) was awarded the 2017 Sylvia Rivera Award in Transgender Studies.
 - Zlatinka Blaber (Accounting and Finance) was awarded a Japan Studies Institute Fellowship organized by the American Association of State Colleges and Universities.
 - Bethany Jay (History) played a central role in the Southern Poverty Law Center Report detailing the insufficiencies of teaching the history of American slavery.
 - David Gow (Psychology) presented at the prestigious Boston HUBweek.

- Cameron Beatty (Education) was awarded the Emerging Scholars Award from the American Personnel Association-College Student Educators International.
- Professional Development: Offered faculty workshops on teaching for equity and diversity; workshops for 100% online programs and online course design; general education courses in Diversity, Power Dynamics, and Social Justice; and faculty learning communities focused on student centered teaching and inclusive excellence.
- Worked with the Biology Department to secure \$127,500 with current funding and planned giving support for student research projects at Cat Cove.
- Secured funding for the Bloomberg Lab terminals totaling over \$200,000.
- Organized the Youth at Risk professional development conference that welcomed over 800 area professionals.
- In partnership with the Center for Creative and Performing Arts (CCPA), theatre department, School of Education and School of Social Work, hosted seven professional development workshops and networking programs.

d. Student Success – Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals.

Academic Affairs has increased student involvement in authentic research experiences with faculty across disciplines. Over the past five years, we have seen increased growth in student participation in both Undergraduate and Graduate Research Days. We have also experienced an increase in our student participation and presentations at regional and national conferences, including: Kennedy Center’s American College Theater Festival; Eastern Sociological Society Annual Meeting; Occupational Therapy 15Th Annual Student Research Day; Massachusetts Statewide Undergraduate Research Conference; and the Black, Brown & College Bound Summit.

Internships allow our students the opportunity to gain relevant learning experience in a workplace environment. To that end, an internship task force was formed to promote better collaboration between our Office of Career Services and academic

programs. Further, the task force will identify best practices that promote rewarding internship experiences.

Executive Vice President Scott James has worked to restructure positions to better serve our students by aligning offices more closely, creating efficiencies, and providing more hands-on staff to work with students. As part of the restructuring, the former director of Student Involvement and Activities (SIA) has assumed the role of director of Residence Life and Student Life Operations. Diversity and Multicultural Affairs combined with SIA and created the Leadership Engagement Advocacy Diversity (LEAD) Office, to address the call for more embedded social justice education in the leadership development of our students. With the reallocated funds, LEAD added a program coordinator for LGBTQIA, and elevated an assistant to an associate director.

Athletics is also reallocating funds, converting more coaches to full-time employees with added administrative duties, to aid in recruiting new coaches and student-athletes. Coaches will assume more responsibility for students' academic success by overseeing Mapworks; developing study halls; and identifying and removing barriers to persistence. Another example of hands-on staff created from reallocated funds is the coordinator for student transition, who will assist with orientation and the development of a coaching model for all new students, and creating collaborations across campus.

Student Life (SL) has been organized into three clusters that allow staff to develop synergy, maximize resources, and focus on reaching depth in high impact practices. As the SL curriculum continues to develop, three-dimensions of learning and development were identified as the foundation for our work: Courageous Leadership; Self-Authorship; and Community Development. Articulated knowledge and abilities were identified with the expectation that students will go from beginner to expert on each dimension. The clusters will create coordinated programming to develop these dimensions in each student. In concert with Academic Affairs, this work will be at the center of the coaching model for all students.

I applaud the work of Cynthia McGurren, our Vice President for Institutional Advancement who has prioritized identifying resources for our underserved students and has been directly involved in fostering professional development opportunities for many of our students:

- A collaboration including CCPA, theatre department, School of Education and School of Social Work, resulted in seven professional development workshops and networking programs.
- The continued partnership with the Bertolon School of Business and Career Services helped to create a job shadowing program, which will launch in the fall of 2018.
- Identified, solicited and secured over \$100,000 in funding in support of my inauguration. Proceeds not used to cover the inauguration (in excess of \$50,000) will be used for scholarships to assist underrepresented students.
- Student Philanthropy Council/Senior Class Gift program leveraged peer-to-peer outreach to educate current students on philanthropy and giving back to their communities.
- A collaboration including the Latin American Student Organization (LASO), Student Advocacy Office, and Student Community Service Group developed fundraising initiatives.

CONCLUSION

While still not through my first full year, quite a start it has been indeed. With each and every day, I am more confident in our ability to meet the increasingly complex challenges facing higher education and deliver for our students an inclusive, excellent, affordable, civically engaged and globally aware education. They deserve no less.

I look forward to working with the BOT and our entire campus team on these goals and priorities during AY 2018-2019.

AY 2018-2019 Goals and Priorities:

- ✓ Increase enrollment +100 students;
- ✓ Obtain funding for STLA;
- ✓ Initiate/plan new comprehensive fundraising campaign;

- ✓ Increase additional auxiliary revenues (summer housing);
- ✓ Gain approval of Occupational Therapy Doctorate (clinical);
- ✓ Gain approval of our BS in IT;
- ✓ Evaluate “online” initiatives/collaborations;
- ✓ Seek “control” of strategic Canal Street properties;
- ✓ Hire a new permanent VP for Diversity and Inclusion;
- ✓ Build on our concerted efforts to increase faculty of color;
- ✓ Continue making positive gains toward closing the achievement gaps;
- ✓ Draft Cat Cove business plan and evaluate private collaborations.



PRESIDENT
Leadership Profile



Contents

Welcome	1
At a Glance	2
The Opportunity	3
Salem State University: An Overview	4
Indicators of 21st Century Growth	5
Points of Pride	6
The Role of the President	8
Opportunities for Presidential Leadership	9
Qualities and Qualifications of the Ideal Candidate	12
The University	14
Serving the Community and Region	22
About the City of Salem	24
Procedure for Candidacy	

Welcome

Dear Prospective Candidate,

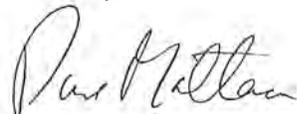
Thank you for your interest in Salem State University's presidential search. As the chairs of the Board of Trustees and the Presidential Search Committee, we invite you to explore this leadership profile and the university's website which will give you a better feel for the campus and its mission. We have high expectations for our 14th president and are confident that this prospectus helps paint the picture of Salem State's trajectory of excellence.

Over the last ten years, Salem State has grown and matured in many ways, including growth in the physical campus, increased diversity and graduation rates, expansion of academic programs, improvements in student life and successful completion of a \$25 million fundraising campaign. As the university has evolved to reflect our global society, we remain committed to our mission, values and heritage and to our strong partnership with the exciting, historic city of Salem, Massachusetts. Today, Salem State University is a flagship of the higher education system in the Commonwealth of Massachusetts, and we remain committed to affordability and accessibility for first generation college students.

Opportunities abound for a new president to continue this forward momentum, to boost private philanthropy, to further expand the university's infrastructure, to strengthen our partnerships with the region and to set a strategic direction for this great institution. Simply stated, Salem State University's foundation is exceptionally strong. If you are a remarkable leader who will propel this institution into the future, we would like to hear from you.

We appreciate your interest in this position and wish you the best as you begin your candidacy. Thank you for your consideration of Salem State University.

Sincerely,



Paul Mattera
Chair
Board of Trustees



Teresa Chisholm
Chair
Presidential Search Committee

At a Glance

Students

Salem State University is the most diverse public university in the Commonwealth with over 29 percent of the student population from underrepresented backgrounds.

9,000

Full-Time Faculty

Salem State's faculty represent a wide variety of academic institutions including the most prestigious in the country and the world. The university has been recognized twice in the past five years as being among the top producing institutions of Fulbright Scholars.

351

Graduation Rate

From 2007 to 2016, the graduation rate for baccalaureate students increased 15 percentage points—the largest change in the state university system.

52%

Campus Investment

Over the past decade, nearly 760,000 square feet of new construction and renovations have been made, bringing state-of-the-art academic and student life spaces to campus.

760,000
square feet

10,000 Reasons Campaign

Salem State University completed its first comprehensive fundraising campaign exceeding its \$25 million goal by more than a million dollars.

\$26
million



The Opportunity

Salem State University seeks a visionary and collaborative president to build on its history of success and lead the university to the next level of achievement.

Salem State is on the move. Designated a university in 2010, our campus has been energized by new state-of-the-art facilities, an increase in freshmen applications, improved student graduation and retention rates, growing alumni engagement, talented leadership throughout the organization and an expanding role in the region.

Located just 15 miles north of Boston, Salem State is one of the largest and most diverse state universities in the Commonwealth of Massachusetts and is an important partner in the economic, cultural and intellectual vitality of the greater north-of-Boston region. Situated in the historic seacoast city of Salem, Massachusetts on more than 115 acres and five campuses, Salem State provides a diverse community of over 9,000 students, a high quality, student-centered education; one that prepares them to contribute responsibly and creatively to a global society and to serve as a resource to advance the region's cultural, social and economic development.

The university supports a full-time faculty of over 350 and offers 32 undergraduate degree programs in the liberal arts, human services and business, along with graduate programs that offer degrees in 24 fields such as education, science, humanities, business, criminal justice, and nursing, among others. The university also has a continuing education division that offers both credit and non-credit programs.

Salem State's faculty represent a wide variety of academic institutions including the most prestigious in the country and the world. The university has been recognized twice in the past five years as being among the top producing institutions of Fulbright Scholars. Faculty hold a deep commitment to teaching and learning and pride themselves on connecting with students at an individual level. Student learning opportunities are personal and collaborative, yet large enough to broaden students' understanding of their world.

The university's students hail from 28 states and 63 countries. The university is proud that 35 percent of its 2016 freshman class self-identified as being students of color. Salem State has over 65 student groups and clubs, 15 varsity teams along with intramural sports, and hundreds of student activities scheduled throughout the year. The university has a nationally award-winning residence life program. One-third of the undergraduate degree-seeking population, including two-thirds of the freshman class, lives on campus. More information about the university and the presidential search can be found at saalemstate.edu.

For information regarding how to express a candidacy or to make a nomination for this position, please see the section entitled "Procedure for Candidacy" at the end of this document.



Salem State University: An Overview

Salem State's 163-year history reflects the growth of its mission and its vital role in the nation, the Commonwealth and the local community. From its beginnings as a teaching college to the large, diverse and comprehensive academic institution it is today, the university has remained true to the value of its founders, and continually seeks a forward path, adapting to society's changing needs while ensuring the intellectual and material well-being of the North Shore region of Massachusetts and beyond.

Mission Statement

Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society, and serve as a resource to advance the region's cultural, social and economic development.

Vision

Salem State University will be a premier teaching university that engages students in an inspiring transformational educational experience.

- We put students first in all that we do and are committed to their success.
- We are a community of learners where all faculty, staff and students have the opportunity to grow as individuals.
- We are innovators, offering a unique brand of public higher education that inspires students to reach higher and achieve more.
- We remain true to our heritage as a liberal arts university while we prepare students for today's workforce.
- We serve the communities of the North Shore while we create an ever more globally aware and culturally diverse campus environment.

The Board and Department of Higher Education

Salem State University is part of the Massachusetts public higher education system, which is comprised of nine state universities, 15 community colleges and the five-campus University of Massachusetts System. Tasked with defining the mission of and coordinating the Commonwealth's system of public higher education, the Board of Higher Education (BHE) has a particular responsibility for the state universities and community colleges and broad oversight responsibility for the University of Massachusetts. The Department of Higher Education, headed by a Commissioner, is the executive arm of the Board of Higher Education. The Board participates in the appointment of community college and state university presidents, approves presidential appointments and sets presidential compensation. The Department of Higher Education is one of three agencies in the Commonwealth, and the Executive Office of Education facilitates communication and coordination between and among those three education agencies.

The BHE is responsible for establishing statewide, system goals for the state universities and community colleges. The BHE is currently reviewing existing statewide goals within the context of developing a statutorily mandated performance measurement system for public higher education institutions. Meanwhile, the existing statewide goals are embodied in the Vision Project, an initiative that aims toward national leadership in six key areas of educational work: (1) college participation; (2) college completion; (3) student learning; (4) workforce alignment; (5) closing achievement gaps; (6) educating citizens. Each year the BHE collects data tracking progress on these outcomes for each institution, and shares these data with presidents and campus boards. The BHE has also launched a major initiative to achieve cost savings through heightened collaboration among the colleges and universities and asks the individual colleges to participate in these efforts.

Indicators of 21st Century Growth

	2006	2016	CHANGE
Student FTE	7,225	7,226	0%
Resident Students (Housing capacity not students housed)	1,404	2,282	63%
Percent Students of Color	14.8%	29.4%	99%
Graduation Rate*	37%	52%	41%
Full-Time Faculty	320	351**	10%
Degrees Awarded	1,434	2,214	54%
Campus (number of buildings)	20	29	45%
Campus (total square feet)	1,152,221	2,046,328	78%
Total Revenues	\$106,813,338	\$163,958,382	53%
International Partnerships	3	25	733%
Community Service Hours	1,281	359,891	27995%
Percent of Students on Deans List	38%	44%	16%

*Data is from 2007 and 2017 (projected)

**2015 IPEDS data





Points of Pride



- **University Status** – In 2010, Salem State College became Salem State University, a legislated change in status which reflected the large, comprehensive institution the university had become. University status brought greater recognition to the high quality of Salem State’s academic programs and the many accomplishments of its faculty and students. With the university designation, Salem State expanded academic programming grounded in the expertise of its faculty and designed to address the changing needs of its community and workforce. Among many highlights, Salem State’s School of Social Work was ranked #91 (of over 250 programs) by *US News & World Report* in 2016 and is the highest ranked public program in Massachusetts.



- **Increased Graduation Rates** – Student success is Salem State’s key goal. From 2007 to 2016, the graduation rate for baccalaureate students increased 15 percentage points—the largest change in the state university system. Salem State’s six-year graduation rate for first-year freshmen increased from 37 percent in 2007 to 52 percent in 2016, with a graduation rate for transfer students at 67 percent. This growth reflects the exceptional efforts of faculty and staff to support students, and the university continues to set aggressive goals in the area of student success.



- **Diverse Community** – Salem State University is the most diverse public university in the Commonwealth with over 29 percent of the student population from underrepresented backgrounds. In addition, over 35 percent of students identify as first generation college students. Salem State is known for its culture of inclusion and, over the last five years, the university has expanded cultural and identity based programs and dialogues. Given population trends, the university is preparing to be a Hispanic Service Institution in future years. Salem State recently added a vice president of diversity and inclusion to the President’s Executive Council.



- New State-of-the-Art Academic and Student Life Spaces** – Changes to the physical campus over the past decade are profound. Nearly 760,000 square feet of new construction and renovations have been completed or are underway, bringing state-of-the-art academic and student life spaces to campus. Through the support of the Commonwealth of Massachusetts and generous donors, combined with resources of the university’s operating budget, over \$250 million has been invested in campus improvements. Highlights of these changes include the Frederick E. Berry Library and Learning Commons, the Sophia Gordon Center for Creative and Performing Arts, the Harold E. and Marilyn J. Gassett Fitness Center, athletic fields and courts, and two residence halls that provide accommodations for nearly 900 students. Efforts are currently underway to secure the Commonwealth’s support for a new science facility to meet the strong demand for science, health care, and technology programming.
- Residential Campus** – In recent years, Salem State has shifted from a commuter campus to a more residential campus. Currently, one-third of the undergraduate degree-seeking population lives on campus, one-third lives in local neighborhoods, and the remaining third commutes from home. In addition to new residential facilities, Salem State has also added a new student life co-curriculum.
- A Successful Comprehensive Fundraising Campaign that Raised Over \$26 Million** – In December of 2016, Salem State announced the successful completion of the university’s first comprehensive campaign. Exceeding its \$25 million goal, over \$26 million was raised during the campaign from more than 11,000 donors, with a remarkable 93 percent participation rate among faculty and staff. The funds resulted in the establishment of 48 new scholarships for students and much needed financial support for academic programs.



The Role of the President

The president serves as the chief executive officer of Salem State University and is responsible for ensuring the university delivers high-quality, student-centered programs for a diverse community of learners, in accordance with the institution's mission.

The president reports to the **Board of Trustees**. Reporting to the president are the members of the **President's Executive Council (PEC)**:

- Provost and Academic Vice President
- Vice President of Enrollment Management, Student Life and Marketing
- Vice President for Finance and Business
- Vice President for Diversity and Inclusion
- General Counsel and Vice President of Administration
- Vice President of Institutional Advancement
- Executive Director of Strategic Planning and Decision Support
- Chief of Staff to the President

The president has an **office staff** of six full-time members, including:

- Chief of Staff to the President
- Director of External Affairs
- Director of Public Relations
- Executive Assistant and Secretary to the Board of Trustees
- Public Relations Associate
- Senior Assistant and Assistant Secretary to the Board of Trustees

Salem State's Leadership Cabinet members also work closely with the president and meet two times per semester. Members of the cabinet include senior academic and administrative staff across the institution. A full list of **cabinet members for academic year 2016-17** is available [here](#).

Additionally, the president serves as a member of the Council of Presidents of the Massachusetts State University System, along with the presidents of the eight other institutions in the Massachusetts State University System.



Opportunities for Presidential Leadership

Under the leadership of its current president, Salem State has thrived through historic changes in the regional and national landscapes for public higher education. Among its many achievements and distinctions, the university has recently begun to employ efficient planning processes tied to budget and measured by outcomes and data based dashboards. Having come to the end of its last strategic plan and celebrated the successful conclusion of a supporting comprehensive campaign, the university began a visioning and strategic planning process in fall 2016. The plan will be presented to the Board of Trustees in June 2017 for approval but will be open to revision after the review and input of the next president.

The next strategic plan has much on which to build. The university is a thriving and caring campus community distinguished by academic quality and achievement; a student-centered approach to teaching and learning; deep roots in the liberal arts tradition; a strong and enduring commitment to diversity and social justice dating back to the university's connections with early abolitionists; dedicated faculty, staff and students who strive to do and be their best; and accomplished alumni who are making a difference in their professions, their communities, and the wider world.

Undergraduate education is the cornerstone of Salem State's mission. Alumni speak passionately about the transformational experience that the university provides to its students, the more than 35 percent of whom are first generation college students. Salem State is committed now and for the future to its liberal arts heritage, academic freedom, equity and access, affordability, inclusivity, social justice, student-centeredness, and a sense of community that gives it a small-college feel in a university setting. The university's colleges educate and empower Salem State's students to become responsible global citizens and contributors to the regional community and economy.

Recent investments in student services and support, campus life, and new residence halls, as well as a continued commitment by faculty and staff to student success have been responsible for a significant rise in retention and graduation rates, and especially so among underrepresented populations. The university also has a long history of offering excellent graduate education. The programs in the graduate school include some of the largest in the university and have a major influence on preparing the workforce in the Commonwealth. Graduate education supports the strong undergraduate experience at Salem State, and the university seeks to expand its graduate education capacity moving forward.

The university's strategic plan will leverage a number of strengths:

- Salem State will continue to be a thriving, welcoming, inclusive, adaptive university that graduates civically minded, socially conscious individuals ready to tackle whatever challenge comes their way; they will be motivated to engage in addressing societal problems that affect the common good and well prepared to succeed and lead in their careers and communities.
- Salem State will continue its impressive gains in retention and completion rates, closing the achievement gap between majority and under-represented student populations, and doing its part to meet the evolving workforce needs of our state and region.
- The university will continue to grow in recognition and respect for its innovative thought leadership, for its leadership in the realm of diversity and inclusion, and for championing causes of social justice.
- Salem State will leverage its location in historic Salem, on the North Shore of Massachusetts and in close proximity to the state's capital, in ways that both enhance the educational experience of students and contribute significantly to regional health and prosperity.
- As a result of effective fiscal planning, asset management, financial efficiency and fundraising, Salem State will grow more financially stable and invest more fully in its mission, in its students, and in realizing its potential as a great public university.

Key Presidential Priorities

Strategic Focus

- The university's strategic plan will provide the next president and the university community a set of priorities for moving forward, along with the flexibility and room to bring those priorities to life through strategic implementation. Given regional and state demographics and public higher education's resource constrained environment, it will be important for the president and university community to agree quickly on a clear, concise and realistic vision and focus to guide decision making, specifically around which current and future initiatives fit within the vision and should be moved forward.
- The new president will be expected to work collaboratively across the university to strengthen Salem State's financial foundation, align resources with priorities, and foster innovation and continuous improvement in all areas of the university.
- The new president will be expected to work collaboratively across the state's public higher education system and improve the institution's performance on each of the key statewide system goals identified by the Board of Trustees and Department of Higher Education.
- Given the university's current contractual and debt obligations, revenue growth is essential to support current and new strategic initiatives. In addition to fundraising, the greatest potential exists in the following areas:
 - Graduate and continuing education enrollment
 - Public private partnerships
 - Campus utilization—emerging opportunities exist to more fully leverage campus space year-round

Academic Excellence and Student Success

- Salem State prides itself on a long tradition and commitment to excellence in the liberal arts and sciences and complementary graduate programs. The university needs to continue to develop and support high-quality academic programs, outstanding faculty, and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce, rapidly changing economy, and increasingly complex and global society.
- As the most diverse campus among Massachusetts' nine state universities, Salem State must create a challenging and supportive learning environment that fully engages all students in their learning and promotes attainment of academic, personal and career goals.
- The university's continued investment in undergraduate student engagement and residential programming has paid off with increasing retention and persistence rates and a robust campus life environment. Given regional demographics, undergraduate enrollment is expected to stay level. However, graduate and continuing education enrollment offers significant potential for enrollment and revenue growth and needs strategic leadership to make that happen. In addition, in 2017 the university is seeking approval for doctoral education.
- Among the university's immediate priorities is the successful conclusion of an Association to Advance Collegiate Schools of Business (AACSB) accreditation process for the Bertolon School of Business.

University Advancement

- The president must be an active external representative and fundraiser for the university, building on the success of the recent comprehensive campaign and focusing on better engaging the university's vibrant alumni community to foster a culture of philanthropy.
- Among Salem State's hallmarks is its leadership in civic engagement through real-world learning opportunities, service to the community, and collaboration in the cultural, social and economic development of the region and state. The next president is expected to continue to model and promote civic engagement.
- Salem State has been steadily increasing public awareness of its academic strengths, institutional distinctions, and achievements and contributions of the university's faculty, staff, students, and graduates. More work needs to be done at the state level to advocate for investment in public higher education and, particularly, in Salem State's unique blend of programs and role in workforce development and cultural contributions to the region. The president will be a partner with the external local and regional communities and will serve not only Salem State's internal constituents, but also play a key role as a visible leader and advocate for public higher education in the Commonwealth of Massachusetts.

Community and Team Building

- The president of Salem State plays an important visible, internal role in building a culture of collaboration, teamwork, integrity and respect.
- Like many institutions of public higher education across the country, Salem State is improving its ability to foster a university-wide culture of excellence, accountability, collaboration and inclusion that attracts and retains talented, diverse faculty and staff committed to student success and university goals. The next president will inherit a strong, talented senior leadership team that is committed to incorporating contemporary best practices in the university's management functions. The community is committed to the principles and practice of shared governance and seeks a president who will support efforts to increase effective engagement and involvement of university constituents in strategic decision processes.
- Salem State University's culture and history as a tightly knit community has been tested by the changing external landscape. A president who can embrace and build trust with this community, communicate with transparency about the challenges and choices ahead, and invite broad participation would be welcome.
- As the institution evolves, it is critical that the university invest in and open access to internal professional leadership opportunities. Utilization, retention and celebration of talented faculty and staff are essential to the success of the organization.
- The diversity and active engagement of Salem State's student body are among the institution's unique strengths. Though the university has historically had a diverse population, the student body has become significantly more diverse over the last ten years, and in 2016, it hired its first Vice President for Diversity and Inclusion. The university is currently undertaking a **campus climate study** to assess how students, faculty, and staff experience the current campus environment. The new president must continue to embrace Salem State's historical commitment to diversity, actively engaging in conversations with students, faculty, staff, and alumni about what diversity and inclusion means for the institution today. Additionally, more work can be done to continue to actively recruit and retain diverse faculty members who will reflect the growing diversity of the student body.

Modern, Safe and Sustainable Campus Environment

- Salem State has been making progress in providing up-to-date and environmentally friendly facilities (including new buildings being LEED certified silver or better), technology and infrastructure to meet evolving needs, advance teaching and learning, and attract high-quality faculty, staff and students. A campus master planning process is underway that will identify the most cost effective and value added improvements, as well as recommendations for consolidation and strategic use of its multiple campuses.

Qualities and Qualifications of the Ideal Candidate

Salem State's president will be a visionary and collaborative leader of people and programs with outstanding communication and interpersonal skills. Minimum qualifications include:

- An earned doctorate (including but not limited to a PhD, JD or EdD) coupled with substantial experience relevant to Salem State's mission and needs; in exceptional circumstances, an earned master's degree, coupled with substantial experience relevant to Salem State's mission and needs may satisfy minimum educational requirements.
- Substantial experience in a senior-management position in higher education, or outside higher education where such experience is deemed relevant to, and provides a basis for judging the candidate's capacity to serve as a college or university president.

To be successful, the president must also possess: the capacity to articulate and implement a shared vision; a commitment to shared governance; a record of successful administrative experience; and proven financial management skills. The ideal candidate will demonstrate a track record for creating and strengthening relationships with multiple stakeholders. Successful, hands-on experience with constituent relations and fund raising is essential.

In addition, the president should demonstrate the following preferred characteristics:

- Commitment to fostering excellence in teaching and research
- Entrepreneurial skill and willingness to take risks
- Evidence of significant fiscal responsibility, strong business and financial acumen, and creativity in maintaining a healthy financial position to support mission delivery
- Experience in and/or commitment to public higher education
- Prior executive-level experience
- Deep understanding of the current context of public higher education nationally
- Ability to lead change
- Data based decision-making approach that balances transparency and consultation with ability to make tough decisions
- Experience with and/or deep interest in student interaction and advocacy
- Commitment to fostering an open, accessible and diverse community
- Understanding of the role of faculty and staff, particularly in an institution guided by collective bargaining
- A collaborative and naturally consultative leadership style
- Ability to distill, reflect and articulate complex ideas and information to the university's constituents
- Ability to build effective partnerships with external constituents
- Ability to be a successful fundraiser for the university
- Charisma and an ability to share the institution's success stories with the broader community
- Ability to partner effectively with a public board of trustees
- Understanding of and ability to work effectively in the political landscape
- Blend of energy and stamina
- Ability to listen, build trust and move initiatives forward



The University

Salem State's academic structure is comprised of the College of Arts and Sciences, the College of Health and Human Services, the School of Education, the Bertolon School of Business, the School of Graduate Studies, and the School of Continuing and Professional Studies.

Salem State's top undergraduate majors include: business administration, nursing, education, criminal justice, biology, psychology, communications, sport and movement science, English, social work and history. The university's liberal arts model prepares students to think critically, communicate effectively and ready themselves to fulfill the demands of tomorrow's changing work force. They are assisted in this endeavor by a highly credentialed faculty.

Salem State's **School of Graduate Studies (SGS)** provides a graduate experience and a degree that helps students reach their goals. SGS offers degrees in 24 fields that allow students to earn master's degrees, graduate certificates, educator licensure, and a Certificate of Advanced Graduate Study (CAGS) in education. The disciplines include: Master of Arts, Master of Arts in Teaching, Master of Science, Master of Business Administration, Master of Science in Criminal Justice, Master of Education, Master of Science in Nursing, Master of Science in Occupational Therapy, and a full-time program in Master of Social Work (the only program of its kind among the Massachusetts state universities). SGS graduates become leaders in their professions and communities. Students apply what they learn in the classroom and through their original research to their jobs and develop professional networks with faculty and area workplaces.

The **College of Arts and Sciences (CAS)** is home to the university's general education curriculum, the cornerstone of the university's commitment to offer all students an academically rewarding and intellectually diverse education. CAS is home to 20 departments, such as art + design, theatre and speech communication, English, biology, chemistry and physics, computer science, world languages and cultures, history, economics, and geological sciences, to name but a few. It is important that all students explore ideas, test concepts, learn, grow, and most of all question. The college's goal is to offer its students the best academic preparation and degree possible.

The **College of Health and Human Services (CHHS)** houses four of Salem State's service-oriented programs: the schools of nursing and social work and the departments of criminal justice and occupational therapy. Each program blends academics and field-work so students graduate with a well-balanced education that prepares them to join the work force or pursue advanced degrees, which are offered in each of the programs. Recognizing the unique interdisciplinary nature of the respective professions, CHHS seeks to promote a humanistic, caring environment, which maximizes student potential and instills sensitivity to current social problems and issues.





The **Bertolon School of Business**, which honors the generosity of entrepreneur and alumnus Henry Bertolon '74 and his wife, Donna, instills in its undergraduate and graduate business majors the development of strong business skills, sound ethics and a global world view. As Salem State's largest undergraduate major, it attracts students—and faculty with diverse specialties—from across the region and throughout the world. Students pursue a number of majors within business including accounting and finance, marketing, management, and decision sciences.

The **School of Education**, the university's founding program, has nearly 20,000 graduates that are making a difference as public school teachers, early childhood professionals, counselors, higher education administrators, community educators, and nonprofit directors. Through a recently transformed curriculum, students have the opportunity to pursue the combined bachelor's and master's 4+1 program which is designed to send expertly prepared, experienced teachers into our public school classrooms. Promising careers in education abound in communities across the Commonwealth—from preschools, K-12 schools, universities, childcare centers, and afterschool programs to national parks, museums, group homes, health centers, and hospitals.

The **School of Continuing and Professional Studies (SCPS)** is home to part-time and off-campus undergraduate programs, Salem State Online, Summer at Salem State, and the Center for International Education. SCPS works closely with community and international partners, businesses, and other institutions of higher education to provide expanded access to Salem State's academic programs and resources. The university offers undergraduate degrees and international education programs in a wide range of disciplines, including business administration, nursing, psychology, and education.





Faculty

As of fall 2015, 91 percent of Salem State's 351 full-time faculty members held terminal degrees: 84 percent held doctorates and 7 percent of creative and performing arts faculty held MFAs, while 9 percent held master's degrees or the equivalent and, of these, six are currently enrolled in doctoral programs. Among full-time faculty members in 2015, 80 percent identified as white, non-Hispanic (compared to 90 percent in 2010) and 56 percent were female (compared to 53 percent in 2010). Of Salem State's part-time faculty, in 2015, 95 percent continued to identify as white, non-Hispanic, while the number of females increased to 61 percent (compared to 59 percent in 2010).

Students

For the fall of 2016, Salem State received over 6,000 applications from prospective first time undergraduate students, an increase of nearly 30 percent over the past five years. The acceptance rate was 74 percent, and the yield was 25 percent. A total of 1,145 first time freshmen enrolled, with 35 percent identifying as students of color, 65 percent women and 35 percent men. Salem State's students come from 28 states and 63 countries.

For transfer students, 752 new students enrolled with 38 percent identifying as students of color, 59 percent women and 41 percent men.

Overall, the undergraduate enrollment is 7,346 with 38 percent identifying as students of color, 59 percent women and 41 percent men.

Just over 37 percent of Salem State's eligible undergraduate students receive a Pell Grant. Eighty percent apply for financial aid, and 78 percent of all degree-seeking undergraduates receive some type of financial aid—grants, loans or scholarships. Approximately 35 percent are first generation college students.

At the graduate level, 358 new students enrolled in the fall of 2016 with 19 percent identifying as students of color, 76 percent women and 24 percent men.

Veterans and Active Military

Salem State is proud to be a Military Friendly School as identified by *G.I. Jobs*. The university has also been recognized as one of the "Best for Vets" by *Military Times*, as well as a Top College and University by Military Advancement Education. Salem State hosts a student veteran organization that was awarded "Chapter of the Month" in 2013. Salem State is a member of the Paul Revere Battalion of the Army ROTC Program, a group that includes MIT, Harvard, Wellesley, Gordon, Endicott, and Tufts Colleges/Universities. Approximately 250 veterans and active military are enrolled at Salem State.

Alumni

Salem State has over 60,000 living alumni, approximately 80 percent of whom are Massachusetts residents. The alumni association is a vibrant group of volunteers who have a leadership role in both friend and fundraising. There are a number of affinity groups to engage alumni, and over 50 alumni-based events each year. One member of the university's board of trustees is selected by the alumni association Board to represent the alumni on this governance entity.

Student Life and Enrollment Management

At Salem State, the area of student life is committed to helping students balance their academic, social and civic responsibilities with their own personal growth and development. Staff in student life are advocates for diversity and social justice, which is reflected in programs and services. The university has a very active student government, as well as over 65 student groups and clubs. Recently, student life has also:

- Increased its focus on student leadership and social justice
- Shifted to a "one stop" navigation center for students
- Grown Salem State's Greek life community
- Hired a new assistant vice president and dean of students who is restructuring student life to include an "Engagement Cluster," a "Wellness Cluster" and a "Student Experience and Transition Cluster"

Athletics and Recreation

Salem State offers its students a chance to compete in a variety of competitive intercollegiate conferences and intramural athletic clubs. With the addition of a state-of-the-arts fitness center, the Gassett Center, students enjoy 40,000 square feet of aerobic and strengthening space along with open areas for various classes and "pick-up" sports.

Salem State fields men's and women's teams in 15 sports; plus 10 intramural/club teams.

Athletic teams compete in the Eastern Collegiate Athletic Conference (ECAC) Division III, the Little East Conference (LEC), the Massachusetts State College Athletic Conference (MASCAC), the National Collegiate Athletic Conference (NCAA) Division III, and the New England College Athletic Conference (NECAC).

Intercollegiate Sports:

Baseball (m)	Lacrosse (m/w)
Basketball (m/w)	Soccer (m/w)
Field Hockey (w)	Softball (w)
Golf (m)	Tennis (m/w)
Ice Hockey (m/w)	Volleyball (w)



Governance

Salem State's board governance consists of an 11-person board of trustees. Nine trustees are appointed by the governor for five-year terms, renewable once; one alumni trustee is elected by the alumni association for a five-year term, renewable once; and a student trustee is elected by the student body for one year, renewable. Regular meetings of the board are held four times annually, and as needed.

In accordance with the laws of the Commonwealth and regulations enacted by the Massachusetts Board of Higher Education, the composition, duties and powers of the Salem State University Board of Trustees are articulated within the university's bylaws. The board is charged with the fiduciary management of the institution, including determination of fees, establishment of personnel management policy, staff services, and the general business of the institution. Among its responsibilities, the board appoints the president, subject to the approval of the Massachusetts Board of Higher Education; annually evaluates the president's performance and submits its review to the Board of Higher Education; adopts an annual plan of financial operation; awards degrees in approved fields; and develops the mission statement for the university consistent with the mission of the Commonwealth's system of public higher education and statewide, system goals established by the Board of Higher Education.

Salem State University operates under the principles of shared governance and is governed internally by a series of committees that represent the three campus constituencies: students, faculty and the university administration. Each committee focuses on a different aspect of the institution, recommending policy, advising the administration of community needs or concerns, and voting on committee business. Committees fall into two categories:

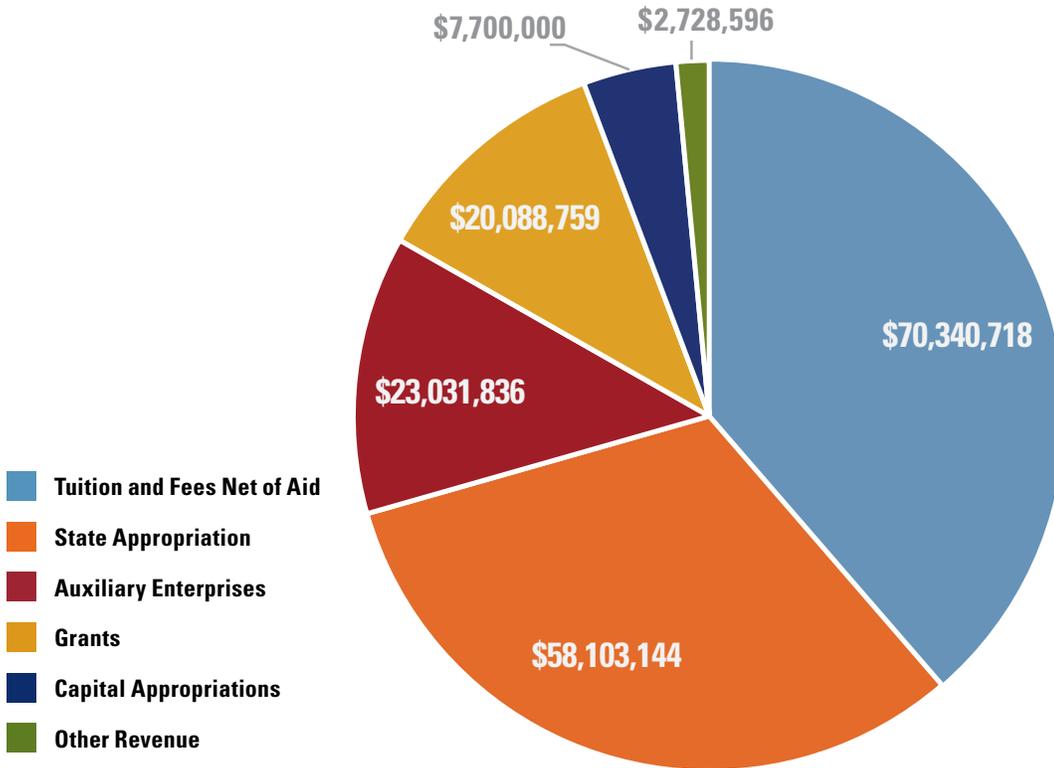
- University contract committees are required by contractual agreements for each state university. At Salem State they include academic policies, curriculum, library/media development, student affairs, and all-university, which acts as the primary agent for coordination and implementation of all contract committees, except for graduate education council, and makes recommendations to the president.
- Non-contract committees, which include both five committees required by law and 26 university advisory committees, are formed by the university president with representatives appointed by the faculty, administration and student government association.



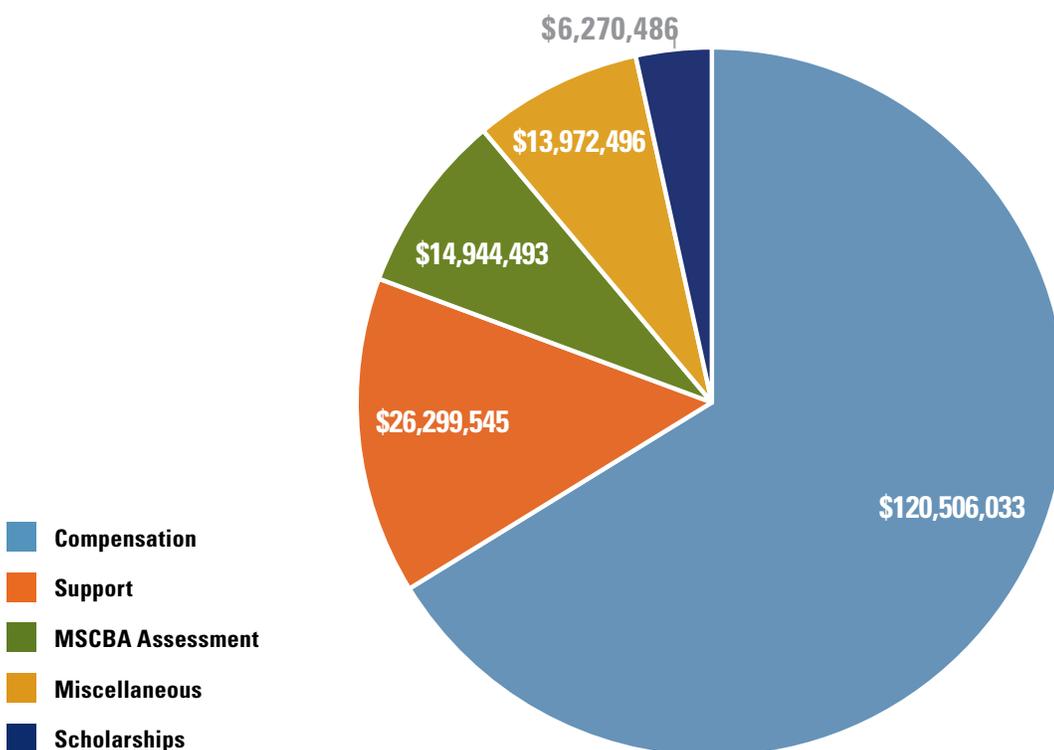
Resources

In 2017 Salem State University transitioned the scope of its budget from an operating budget to an all funds budget. The 2017 all-funds budget is \$182 million and includes the state direct unrestricted appropriation of \$44 million plus funding to pay for fringe benefits expenses, for employees covered by the state payroll, of \$13.9 million.

FY2017 Revenue Budget



FY2017 Expense Budget



The **Salem State Foundation** is a 501(c)(3) private, not-for-profit, tax-exempt organization that raises and manages charitable gifts in support of the university through active fundraising and advocacy. Working with the university and other partners, the foundation operates under the leadership of a **19-member board of directors** comprised of alumni and community leaders. The foundation is legally separate from the university. The foundation also works with university partners to:

- Manage a portfolio of \$27.3 million, with an endowment of \$25.7 million (as of December 31, 2016)
- Increase annual disbursements to academic and administrative departments
- Cultivate and steward a culture of philanthropy

The **Salem State University Assistance Corporation (SSUAC)** was created by a special act of the state legislature in 1994 to facilitate the physical campus growth and development of Salem State and to manage and operate the Enterprise Center. Through the SSUAC, Salem State has been able to build its Central Campus, Canal Street parking lot, purchase the Salem Diner (strategic acquisition), as well as several smaller real estate transactions. The Enterprise Center drives regional business through education, leadership, advocacy, community and economic development on the North Shore. It serves business owners, leaders and employees of companies of all sizes, in all industries and all stages of the business lifecycle. A vibrant component of economic development for the North Shore and beyond, the Enterprise Center also leads the North Shore Alliance for Economic Development and houses the Small Business Development Center and Massachusetts Center for Business Development for the region. The SSUAC owns and operates commercial rental properties. Salem State and the Enterprise Center have partnered to offer professional development courses and to promote entrepreneurship opportunities for our students. The SSUAC is legally separate from the university and the university is not financially accountable for the SSUAC.

The **Massachusetts State College Building Authority (MSCBA)** assists the nine state university campuses with the financing, planning, design, and construction of revenue generating buildings such as residence halls and student activity facilities. MSCBA also oversees the management of these facilities with regard to maintenance and renovations. Over the past ten years, MSCBA has supported the addition of two major residence halls, a large dining facility, the Gassett Fitness Center, the Sophia Gordon Center for Creative and Performing Arts, and a 700+ space parking garage.

Debt: On-Book (Bonds and Note)	\$40 million
MSCBA owned projects	\$202 million
Leases	\$3.4 million

The **Division of Capital Asset Management and Maintenance (DCAMM)**, an agency within the Executive Office for Administration and Finance, is responsible for capital planning, major public building construction, facilities management, and real estate services for the Commonwealth of Massachusetts. In that role, DCAMM collaborates with all state colleges and universities on the construction, maintenance and renovation projects for academic spaces that are owned and funded by the Commonwealth. The most recent example of a DCAMM project at Salem State is the Frederick E. Berry Library and Learning Commons.

Collective Bargaining

Union representation at Salem State University includes three collective bargaining units:

- American Federation of State County and Municipal Employees (AFSCME)
- Association of Professional Administrators, Massachusetts Teachers Association (APA)
- Massachusetts State College Association, Massachusetts Teachers Association (MSCA)

More information on the collective bargaining agreements may be found at the web-site for the **Massachusetts Board of Higher Education**. The agreements are entered into by and between the Board of Higher Education, acting through the Council of Presidents of the State Universities, and the respective collective bargaining agents for members of the bargaining units.





Serving the Community and Region

Community service is one of the university's cornerstone activities. In FY14, students provided 429,510 hours of community service in the following categories: academic service-learning (2,106); forms of community service not including service learning students (608); total number of students who engaged in community service (2,714); and number of courses that integrate community service with academic content (260). Salem State helps support over 80 different local community service groups. Faculty and staff have also been involved with community partners in the planning of programs, and delivery of services and have led non-profits through the process of obtaining 501(c)3 status. For the past three years (2013, 2014, and 2015), Salem State has achieved the highest federal recognition possible for an institution of higher education, with placement on the President's Higher Education Community Service Honor Roll.

Positioned as a public good/resource, the university's collaboration with businesses on the North Shore and beyond have been extensive. University leadership is represented in the North Shore Chamber of Commerce as well as many of the city/town chambers of the region. Expertise of faculty and administration is sought in developing workforce educational programs through the North Shore Workforce Investment Board and business specific opportunities. Many academic service-learning experiences are based in the real needs of local non-profits or small businesses bringing much needed consultation to these entities. Through the Career Services Center, students are able to secure a wide range of internships and other work-related experiences.

Salem State has extensive partnerships with the school districts of the region including three laboratory schools. The Horace Mann Lab School, located on the university campus, is led (as principal) by a faculty member from the School of Education. The mutually beneficial collaborations allow Salem State to continually improve its educational offerings while bringing the benefit of research and resources to the school.

A leading institution in the north-of-Boston region, the university is the second largest employer in the city of Salem and one of the top five employers on the North Shore; 1,000 university employees live in Massachusetts; 177 reside in the city of Salem. The university generated more than \$827 million in economic spending in Massachusetts in FY14, over \$443 million of spending in Essex County and over \$100 million in the city of Salem. Salem Mayor Kimberley Driscoll '89 is an alumna, and the university and city enjoy a very close working relationship.



About the City of Salem

Founded in 1629, Salem, the “City of Peace”, is a small city with a big history. It is the second incorporated city in Massachusetts (April, 1836) and the second oldest settlement in New England (settled four years before the settlement of Boston).

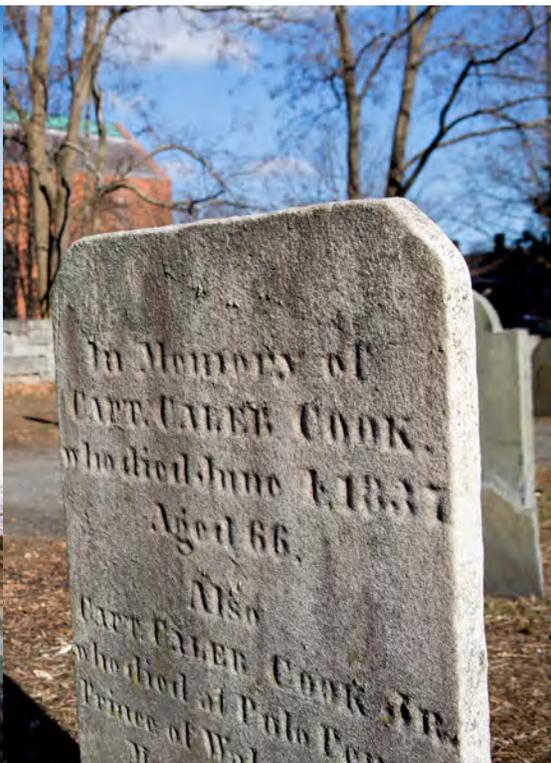
While Salem has been long known as the “Witch City” due to the notable witch trials of 1692, Salem also played a prominent part in Revolutionary times and was an active leader of several Massachusetts industries. In the early part of the 19th century, Salem’s ships were pioneers in the India trade and opened up commerce with Africa, China, Russia, Japan and Australia. In Salem are found mansions that belonged to some of the country’s first millionaires, the birthplace of celebrated author Nathaniel Hawthorne and 18.5 miles of tidal shoreline.

Salem is a vibrant, pedestrian-friendly city where its residents, and over a million tourists annually, can easily visit historic architecture, unique attractions, world famous museums, and an eclectic mix of shops and dining options. And, with easy access to public transportation—including direct access to Boston—Salem is a great city in which to live, work and study.

The university is located in the region of Salem known as South Salem and has strong ties to its neighborhood. After the purchase of the parcel now known as the Canal Street parking lot, the city’s mayor with the agreement of the university president re-established the Salem State University Neighborhood Advisory Committee (SSUNAC). The SSUNAC includes the city councilors serving South Salem, and representatives of the university and neighbors. The group meets monthly to update the community on work of the university and to discuss/ receive input into campus development. Additionally, the current president has regular meetings with the elected leadership of the city. The current process of communication has proved very beneficial in furthering the goal of the university to remain a good neighbor within its neighborhood.

The city, a leader in inclusiveness, has an active No Place For Hate Committee that includes members from the university community. The committee is dedicated to promoting acceptance of diversity and combating discrimination. It is dedicated to mobilizing citizens to challenge bigotry and to promote a prejudice-free community in which all people are respected, understood and appreciated for their differences. Their primary goal is to be a resource to the city of Salem by providing support and education on diversity issues. They seek to protect the promise of equal justice and civil rights for all members of the community.

Furthering its commitment to social justice, the Salem Award for Human Rights and Social Justice was established in 1992, the tercentenary of the Salem Witch Trials. The Salem Award Foundation’s mission is to recognize, honor and perpetuate the commitment to social justice and human rights of individuals and organizations whose work is proven to have alleviated discrimination or promoted tolerance. The university president serves as honorary co-chair of this award committee along with the mayor of the city.



Procedure for Candidacy

Interested candidates should review the Massachusetts Board of Higher Education Guidelines and Procedures for the Search, Selection, Appointment and Removal of State University and Community College Presidents. The Presidential Search Committee will preliminarily screen all applicants and recommend three to five finalists for further vetting by the Salem State University Board of Trustees and the Massachusetts Department of Higher Education. Finalists will be asked to participate in open campus meetings in May 2017. Final appointment is subject to background check and approval by the Massachusetts Board of Higher Education. The president is expected to begin on July 1, 2017.

Confidential inquiries, nominations, and applications are invited. Review of applications will begin immediately and continue until the position is filled. For best consideration, candidates should provide no later than March 31, 2017, a resume or CV, letter of application and the names and contact information of five references. References will not be contacted without prior knowledge and approval of candidates. These materials should be sent electronically via email to Salem State University's consultant, Lucy Leske, at SalemStatePres@wittkiewfer.com

Material that cannot be emailed may be sent to:

**President
Salem State University**

C/O WITT/KIEFFER

Attention: Lucy Leske
2015 Spring Road, Suite 510
Oak Brook, Illinois 60523

Confidential inquiries and questions concerning this search may be directed to 630.575.6122.

SALEM STATE UNIVERSITY IS AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER.
PERSONS OF COLOR, WOMEN AND PERSONS WITH DISABILITIES ARE STRONGLY URGED TO APPLY.

The material presented in this leadership profile should be relied on for informational purposes only. This material has been copied, compiled, or quoted in part from Salem State University documents and personal interviews and is believed to be reliable. While every effort has been made to ensure the accuracy of this information, the original source documents and factual situations govern.

All images and logos used in this leadership profile were provided by Salem State University.

WITT / KIEFFER
Leaders Connecting Leaders

Prepared by

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Ann Yates
Alexis von Kunes Newton
February 2017

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352 Lafayette Street
Salem, MA 01970





Inauguration Address

John D. Keenan, JD

January 19, 2018

Governor Baker and members of his esteemed cabinet; Speaker Robert DeLeo and former colleagues of the Great and General Court; Senator Joan Lovely and Representative Paul Tucker; Mayor Kimberley Driscoll and elected officials of Salem; Commissioner Carlos Santiago; my fellow state university presidents; and to the representatives from other academic institutions - thank you for being here today.

Thank you Chair Mattera and the Salem State Board of Trustees for supporting my appointment to the presidency. Thank you to the inauguration committee for undertaking the planning of today's event. Thank you to my inspiring predecessor Patricia Maguire Meservey who gave me the opportunity to come to Salem State in 2014. Thank you to the entire campus community, students, faculty and staff, for giving me a reason to come to work every day. And to the greater community gathered here, thank you for joining us and welcome to Salem State University.

Thank you all for sharing this special moment for our institution and for my family. Without question, this will rank as one of the top moments in my life – right up there with my wedding day, the days my children were born and my first time being sworn in as state representative.

I stand before you in awe of the incredible responsibility and opportunity I have been offered. Though many have walked this campus, few have had the honor of leading it.

And as I think about the honor it is to shepherd this university into the next decade and perhaps beyond, I think about what made it possible for me to get to this point. The answer, undoubtedly, is education. My education – and the confidence to obtain it – have made all the difference in my life. I firmly believe the famous words of Horace Mann – education is the great equalizer.

It's easy for this to get lost in the day-to-day routine on campus, but we must remember that through our work at Salem State, we are fighting for equality. We are promoting democracy. We are advancing social justice. We know that when it comes to education, access alone is often not enough. True success requires a community that believes in you.

I have been blessed to have mentors, teachers, coaches, friends, classmates, roommates, colleagues, and family who have shaped me into the man standing before you today as the 14th president of Salem State University. The cliché goes: it takes a village to raise a child. My village has been this great community of Salem.

Our students find that village here at Salem State. We are the community that guides them. The support that propels them. And the voice that tells them they can. To those of you who work every day to be that community, thank you.

The only greater honor than being on this stage is working with you to be part of the solution. At Salem State, we not only advance equality by providing an excellent education, but we teach the values that lead to progress. We teach students to think critically and to question the status quo. We foster an environment that encourages activism.

Indeed, it is a unique time to be in America as a student and a university president. Our country is experiencing a time of change, disruption, and division that has not been seen for decades.

In protests and demonstrations that harken back to the sixties, students are challenging campus administrators every day –taking a stand, voicing their opinions, speaking out against racism and sexual assault and for free speech and inclusion.

Divisiveness threatens to, and sometimes succeeds in, tearing apart campuses. We think back to the anti-Semitic chants shouted at Charlottesville, the punches thrown at Middlebury, and to the vandalism that occurred on our very own campus last semester and this week. Although these heinous crimes succeed in putting the worst of society on display, they also open a discussion to begin to heal and tackle racism on campuses across this nation.

While the conversation at Salem State will never be over, I can say we are making progress. We will have this conversation and take action for as long as we must to ensure every student and member of the faculty and staff feels safe and welcome on our campus. We need to ensure that every student at our university, regardless of race, sexual orientation, gender, abilities, beliefs, and socioeconomic status feels at home at Salem State.

We often and rightly boast about being the most diverse of the state universities. It is important to be proud of this distinction and strive towards remaining so, however, we must be as inclusive as we are diverse.

Our students and faculty come from different backgrounds and have a variety of opinions. We want our campus to continue to debate the difficult issues of the day, to vote in local and national elections, and to tell their stories.

Being in Salem, we have a wonderful opportunity to be connected to our community and our history. Our students are extremely fortunate to be studying in a city that is welcoming to all creeds of people. Salem, however, also gave us one of the most significant periods of darkness in our nation's history.

As a descendent of Rebecca Nurse, one of the women convicted and hanged for witchcraft in 1692, and being trained as a lawyer, I am sensitive to the need to provide adequate due process and to fight for social justice. I have dedicated my life to public service in many instances fighting for social justice – whether for marriage equality, transgender rights, or in-state tuition for “dreamers”.

I think of people like Rebecca Nurse and find it is my duty to be the voice of those who cannot speak out for themselves and to advocate for those who need someone in their corner. I brought this commitment with me to Salem State where I promise to do the same for our students.

As I begin my presidency, I wish to share with all of you gathered here today and with the entire campus the vision I have for this institution.

It consists of three primary components – academic excellence, student success, and capital improvements.

The success of our academic programs relies on our faculty to continue to provide exceptional education to our undergraduate and graduate students.

The Bertolon School of Business has been working diligently on achieving accreditation. We are hopeful that we will prevail during this rigorous process to be amongst only five percent of the world's business schools to be accredited by AACSB.

And in occupational therapy, it was recently mandated that the entry level degree for an occupational therapist will be a doctorate by 2027, we will pursue a clinical doctorate in occupational therapy to ensure the continuation of our program. This will be the first time a Massachusetts State University has applied for a doctoral program.

Salem State has long had a commitment to the sciences. With the top workforce needs of the North Shore in the biotech and healthcare fields, we will remain a leader in preparing students for careers in these important industries.

Beginning as a Normal School, Salem State has always had a foundation in the education of America's teachers. We will stay true to these values and continue to build important partnerships with our local community, preparing teachers and academic administrators.

Over the next decade, we will strive to build upon the student success gained during Dr. Meserve's tenure: we will increase the six-year graduation rate from 52 to 65 percent while also eliminating all achievement gaps. We will grow enrollment by some 2000 students either on campus or virtually.

As we look at the landscape of the North Shore, we recognize that the Hispanic population is the fastest growing. By the shift in demographics, Salem State will likely soon become a Hispanic Serving Institution, with 25 percent of our students identifying as Hispanic. While Salem State would be proud to become the first state university to receive this designation, we must have the resources in place to ensure the success of all incoming students.

As we have already seen our efforts come to fruition, with the Education Trust recently placing us on the list of top 10 schools nationwide for Latino student success, we know it is our duty to increase our efforts.

We are committed to ensuring the success of our Latino students as well as our entire student body.

And over the next decade, I hope to give the opportunity of a college education to the students who live in our own backyard who come from challenging economic backgrounds. The children of Rainbow Terrace and Salem who grow up next door to Salem State deserve the opportunity to thrive at our institution.

Today, I announce the formation of the Dream Scholarship which will provide funding to children of Salem who lack the means to have access to a college education. Donations for this inauguration will begin that fund.

At the heart of our institution is a commitment to fighting for social justice, addressing public issues, and connecting to the greater community. It is our commitment to civic engagement.

As we become a regional leader in civic engagement, we will strive towards Carnegie Classification, a national recognition of our commitment and strong bond between campus and community.

To fulfill the dreams of our students and realize many of the goals I set forth today, we will undertake a comprehensive campaign to rival our recently completed 10,000 Reasons Campaign which raised over 26 million dollars. As state universities must become more self-reliant, I hope to increase our efforts and at least double that total in our next campaign.

We must not only grow our student body and increase student success; we must build the facilities needed to achieve the same in the 21st century.

Many of our past presidents have focused on the physical development of our campus, with some of the most significant changes taking place under the leadership of Presidents Keegan, Meier, Harrington and, most recently, Meservey. They gave us some of our most recognized facilities. We will build on that momentum and legacy.

Because of this growth, Salem State has long been identified as three campuses. It is time to bring us together. During my tenure, I hope to create a centralized, consolidated, single campus. No longer will we be identified or represented by North, South and Central, we will become one Salem State campus.

Without question, our top capital priority is the Science Teaching Laboratory Addition which will meet the work force needs of the region. It is imperative that this facility match the excellence of our faculty and academic programs and enables our planned enrollment growth.

As we work to grow our enrollment by 2,000 students over the next decade, there will be a need for additional housing. We will likely need to build two new residence halls to house the influx of students coming to campus as well as meeting our current demand.

Finally, I will continue our advocacy for a commuter rail station within steps of campus. This will not only continue our mission of environmental sustainability, it will increase access from areas throughout the North Shore and beyond. I very much appreciate Mayor Driscoll's efforts on this front.

Now that I have shared some of my major goals, please allow me a minute, to take a breath, and appreciate this incredible moment.

I stand before you today on January 19, 2018 and cannot believe I take the stage to be sworn in as Salem State's 14th president, an honor held by only 13 others in this school's 164-year history. Moreover, with our early leaders forgoing the inauguration ceremony, the number of presidential inaugurations is even fewer with only eight such ceremonies in our history.

This is quite a feeling – almost surreal. I am humbled, honored, thrilled, but above all, ready.

This is unquestionably the capstone of my career in public service. While I've served as prosecutor, solicitor, and legislator, I would not want to spend the remainder of my career doing anything else but helping our students be successful at Salem State and beyond.

Like a third of our Salem State students, I am a first-generation college student. My mother dropped out of high school to marry my father and raise a family. My father worked at a local leather factory, Flynn Tan, like his father before him. I am a proud product of Salem Public Schools - some of my teachers and coaches join us here today. My parents encouraged my siblings and me to go to college to better ourselves and instilled in us a confidence that we could succeed.

I worked hard in high school and with the relentless advocacy by local dentist Don Sadowski, somehow got into Harvard. I took some time after college working before choosing to attend Suffolk Law with encouragement from my mentor and legal titan of Salem, Judge Sam Zoll.

Though I earned a terminal degree, I did not follow a traditional academic route to the presidency and, for many during my confirmation process, this was a concern. The criticism I faced during my selection process did not dishearten me; it inspired me.

The faculty, staff, and students that spoke out against my selection proved that at Salem State, we are passionate about the education we provide to our students and rightfully hold our leaders to the highest standards.

In many ways, I believe my selection as the 14th president was an acknowledgement of a disruption and shift in higher education leadership in the 21st century. Every university board is looking for a president that brings a unique skill-set to compete in an ever-shifting landscape.

There is a quote from one of our most noted alumna, Charlotte Forten, our first African American graduate, that speaks to why I wanted to become president. It says, “I came not here for friendly sympathy or for anything else but to work and to work hard. Let me do that faithfully and well.”

My children will tell you we have only two rules in our house: “try your hardest” and “be polite”. During my time as president, I will do nothing but that. I will work hard every day to make this university the best it can be.

I also implore my children and our students to get up when they are knocked down. Resilience is critical for success in life.

This applied to me quite literally when I was in high school. As a freshman wrestler, I lost my first match in 19 seconds. I got back up and fought my way through to my senior year when I finished the season undefeated in dual meets. And similarly, while seeking elective office, I lost twice before finally winning.

Life is not easy. It’s about choices, perseverance, and hard work. To my children and our students, I say “do not let criticism or failure hold you from your goals.”

I never would have attained this goal if not for many supporters along the way. Calling this city home for over half a century – I am an extremely proud and grateful son of Salem.

To my mentors, coaches, teachers, college roommates, and law school classmates... this whole community really, I say thank you. I couldn’t have made it here without your challenging me to be my very best.

To my father, who taught me the value of hard work. To my mother who died in 1994, who taught me about commitment. To my older brother and sister, I couldn’t have chosen two more supportive siblings and lifelong friends. To my children who are growing up way too fast, you awe me every day with your zest for life and individuality. And to my wife Kara who married me even though I brought nothing to the marriage but my \$54,000 in law school debt, and who has been a supportive partner in everything I set out to do, know you taught me the importance of balance in life.

I stand before you a proud husband, father, son, brother, and friend – and today, officially the 14th President of Salem State University.

I'll end here with a look to the future. As I mentioned earlier, 2018 is a unique, tumultuous time. As we begin the year and I begin the presidency, I reflect on the world our students are experiencing and the world they can shape.

Survival of our democracy requires respect for civic engagement and disagreement. Indeed, the essence of our academic mission – seeking truth through rigorous research – is fueled by disagreement and question.

Seeking truth has been one of the pillars of my career. As a former prosecutor, I always found that there was no better satisfaction than the cross examination of a witness. Seeking the truth fueled my zeal for the work.

Students, I urge you to find something that propels you through life as public service has for me. Find your passion and purpose.

For our faculty, their academic freedom fuels their work. They conduct research and facilitate conversations that allow them to seek similar truths and share those truths with our students and with the world. I am convinced society needs education today more than ever so future generations can debate robustly and civilly the important issues of the day.

One of the greatest leaders of our time, Nelson Mandela, said “Education is the most powerful weapon you can use to change the world”.

As a university, we have the tremendous opportunity to inspire change by educating our students who will go on to shape and mold the world in ways we cannot imagine. I know we have the will, the talent – and the persistence to succeed in the work ahead.

We are up for the task.

Let us begin.



Rankin & Associates, Consulting

Assessment • Planning • Interventions

Salem State
University

Assessment of
Campus Climate
Executive Summary

October 24, 2017



Rankin & Associates, Consulting

Executive Summary

Introduction: History of the Project

Salem State University affirms that diversity and inclusion are crucial to the intellectual vitality of the campus community and they engender academic engagement where teaching, working, learning, and living take place in pluralistic communities of mutual respect. Free exchange of different ideas and viewpoints in supportive environments encourage students, faculty, and staff to develop the critical thinking and citizenship skills that will benefit them throughout their lives.

Salem State University is committed to fostering a caring community that provides leadership for constructive participation in a diverse, multicultural world. As noted in Salem State's mission statement, "Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society...."¹ To better understand the campus climate, the senior administration at Salem State recognized the need for a comprehensive tool that would provide campus climate metrics for the experiences and perceptions of its students, faculty, and staff. During the spring 2017 semester, Salem State conducted a comprehensive survey of all students, faculty, and staff to develop a better understanding of the learning, living, and working environment on campus.

In February 2016, members of Salem State University formed the Climate Study Working Group (CSWG). The CSWG was composed of faculty, staff, students, and administrators. Ultimately, Salem State contracted with Rankin & Associates Consulting (R&A) to conduct a campus-wide study entitled, "Salem State University Assessment of Climate for Learning, Working, and Living." Data gathered via reviews of relevant Salem State literature, campus focus groups, and a campus-wide survey addressing the experiences and perceptions of various constituent groups will be presented at community forums, which will develop and complete two or three action items by fall 2017.

¹<https://www.salemstate.edu/salem-state-difference/mission-vision-and-strategic-plan>

Project Design and Campus Involvement

The conceptual model used as the foundation for Salem State's assessment of campus climate was developed by Smith et al. (1997) and modified by Rankin (2003). A power and privilege perspective informs the model, one grounded in critical theory, which establishes that power differentials, both earned and unearned, are central to all human interactions (Brookfield, 2005). Unearned power and privilege are associated with membership in dominant social groups (Johnson, 2005) and influence systems of differentiation that reproduce unequal outcomes. Salem State's assessment was the result of a comprehensive process to identify the strengths and challenges of campus climate, with a specific focus on the distribution of power and privilege among differing social groups. This report provides an overview of the results of the campus-wide survey.

The Climate Study Working Group (CSWG) collaborated with R&A to develop the survey instrument. Together, they implemented participatory and community-based processes to review tested survey questions from the R&A question bank and develop a survey instrument for Salem State University that would reveal the various dimensions of power and privilege that shape the campus experience. In the first phase, R&A planned 17² focus groups, which were composed of 103 participants (39 students; 64 faculty and staff). In the second phase, the CSWG and R&A used data from the focus groups to co-construct questions for the campus-wide survey. The final Salem State survey queried various campus constituent groups about their experiences and perceptions regarding the academic environment for students, the workplace environment for faculty and staff, employee benefits, sexual harassment and sexual violence, racial and ethnic identity, gender identity and gender expression, sexual identity, accessibility and disability services, and other topics.

In total, 3,086 people completed the survey. In the end, the University's assessment was the result of a comprehensive process to identify the strengths and challenges of campus climate,

²²Although 17 groups were planned, 16 were conducted. Owing to a miscommunication regarding the time of the Veteran Students group, it was not held. Attempts to reschedule the group on the same day were not successful. An email with focus group questions was sent to Veteran student participants by the R&A lead facilitator with no response. Communications between R&A and the CSWG led to the planning of two additional focus groups to be conducted during the week of November 7th via telephone. These groups targeted Veteran Students and International Students.

with a specific focus on the distribution of power and privilege among differing social groups at Salem State.

Salem State University Participants

Salem State University community members completed 3,086 surveys for an overall response rate of 31%. Only surveys that were at least 50% completed were included in the final data set for analyses.³ Sixty-two percent ($n = 1,920$) were Undergraduate Students, 11% ($n = 325$) were Graduate Students, 7% ($n = 201$) were Staff, 8% ($n = 247$) were Administrators, and 13% ($n = 393$) were Faculty. Table 1 provides a summary of selected demographic characteristics of survey respondents. The percentages offered in Table 1 are based on the numbers of respondents in the sample (n) for each demographic characteristic.⁴

³Seventy-three surveys were removed because they did not complete at least 50% of the survey, and 32 duplicate submissions were removed. Surveys were also removed from the data file if the respondent did not provide consent ($n = 176$). Any additional responses were removed because they were judged to have been problematic (i.e., the respondent did not complete the survey in good faith).

⁴The total n for each demographic characteristic may differ as a result of missing data.

Table 1. Salem State University Sample Demographics

		Undergraduate Student		Graduate/Prof Student		Faculty		Administrator		Staff		Total	
		n	%	n	%	n	%	n	%	n	%	n	%
Gender identity ⁵	Woman	1,371	71.41	247	76.00	242	61.58	151	61.13	112	55.72	2,123	68.79
	Man	489	25.47	74	22.77	139	35.37	87	35.22	77	38.31	866	28.06
	Transpectrum/ Multiple/Other	52	2.71	<5	---	5	1.27	<5	---	0	0.00	63	2.04
	Missing	8	0.42	<5	---	7	1.78	6	2.43	12	5.97	34	1.10
Racial identity	Asian/Asian American	67	3.49	15	4.62	16	4.07	5	2.02	<5	---	105	3.40
	Latin@/Chican@/ Hispanic	242	12.60	21	6.46	16	4.07	5	2.02	23	11.44	307	9.95
	Black/African American	197	10.26	20	6.15	18	4.58	13	5.26	9	4.48	257	8.33
	White	1,197	62.34	247	76.00	296	75.32	198	80.16	129	64.18	2,067	66.98
	Multiracial	167	8.70	13	4.00	16	4.07	12	4.86	7	3.48	215	6.97
	Other Person of Color	15	0.78	<5	---	5	1.27	<5	---	<5	---	28	0.91
	Missing/Unknown/ Other	35	1.82	5	1.54	26	6.62	12	4.86	29	14.43	107	3.47
Sexual identity	LGBQ ⁶	358	18.65	50	15.38	51	12.98	31	12.55	11	5.47	501	16.23
	Heterosexual	1,456	75.83	263	80.92	317	80.66	200	80.97	155	77.11	2,391	77.48
	Missing/Other/ Asexual	106	5.52	12	3.69	25	6.36	16	6.48	35	17.41	194	6.29

Note: The total n for each demographic characteristic may differ as a result of missing data.

⁵ Transpectrum is a re-coded variable collapsing the response choices on the survey of Genderqueer, Transgender, and any write-in responses that were outside the gender binary of "man" or "woman".

⁶ LGBQ is a re-coded variable collapsing the response choices on the survey of Bisexual, Gay, Lesbian, Pansexual, Queer, Questioning, and any write-in responses that were not "heterosexual".

Key Findings – Areas of Strength

1. High levels of comfort with the climate at Salem State University

Climate is defined as the “current attitudes, behaviors, and standards of employees and students concerning the access for, inclusion of, and level of respect for individual and group needs, abilities, and potential.”⁷ The level of comfort experienced by faculty, staff, and students is one indicator of campus climate.

- 75% ($n = 2,407$) of the survey respondents were “very comfortable” or “comfortable” with the climate at Salem State University.
- 74% ($n = 619$) of Faculty and Staff/Administrator respondents were “very comfortable” or “comfortable” with the climate in their departments/work units.
- 83% ($n = 2,178$) of Student and Faculty respondents were “very comfortable” or “comfortable” with the climate in their classes.

2. Faculty Respondents – Positive attitudes about faculty work

- 80% ($n = 311$) of Faculty respondents felt valued by their department/program chairs.
- 68% ($n = 261$) of Faculty respondents felt valued by other faculty at Salem State.
- 89% ($n = 338$) of Faculty respondents felt valued by students in the classroom.
- 74% ($n = 284$) of Faculty respondents “strongly agreed” or “agreed” that their teaching was valued.
- Only 20% ($n = 76$) of Faculty respondents “strongly agreed” or “agreed” that faculty in their departments/programs prejudged their abilities based on their perception of their identity/background.
- 13% ($n = 51$) of Faculty respondents thought that their department/program chairs prejudged their abilities.

⁷Rankin & Reason, 2008, p. 264

3. Staff/Administrator Respondents –Positive attitudes about work

- 63% ($n = 281$) of Staff/Administrator respondents “strongly agreed” or “agreed” that they had supervisors who gave them job/career advice or guidance when they needed it.
- 71% ($n = 309$) of Staff/Administrator respondents believed that their supervisors provided adequate support for them to manage work-life balance.
- 26% ($n = 112$) of Staff/Administrator respondents “strongly agreed” or “agreed” that they were burdened by work responsibilities beyond those of their colleagues with similar performance expectations.
- 69% ($n = 299$) of Staff/Administrator respondents believed that they were given a reasonable time frame to complete assigned responsibilities.
- 63% ($n = 278$) of Staff/Administrator respondents would recommend Salem State as a good place to work.
- 64% ($n = 281$) of Staff/Administrator respondents “strongly agreed” or “agreed” that they had job security.

4. Student Respondents – Positive attitudes about academic experiences

The way students perceive and experience their campus climate influences their performance and success in college.⁸ Research also supports the pedagogical value of a diverse student body and faculty for improving learning outcomes.⁹ Attitudes toward academic pursuits are one indicator of campus climate.

All Student respondents

- 72% ($n = 1,612$) of Student respondents felt valued by Salem State faculty.
- 68% ($n = 1,520$) of Student respondents felt valued by Salem State staff.
- 50% ($n = 1,121$) of Student respondents felt valued by Salem State senior administrators.
- 69% ($n = 1,549$) of Student respondents believed that the campus climate encourages free and open discussion of difficult topics.

⁸Pascarella & Terenzini, 2005

⁹Hale, 2004; Harper & Hurtado, 2007; Harper & Quaye, 2004

- 71% ($n = 1,589$) of Student respondents indicated that they have faculty whom they perceive as role models.

Graduate and Professional Student respondents

- 68% ($n = 219$) of Graduate Student respondents “strongly agreed” or “agreed” that they were satisfied with the quality of advising they had received from their departments.
- 74% ($n = 240$) of Graduate Student respondents felt they had adequate access to their advisors.
- 71% ($n = 229$) of Graduate Student respondents believed that their advisors provided clear expectations.
- 81% ($n = 263$) of Graduate Student respondents felt comfortable sharing their professional goals with their advisors.

Student Respondents *Perceived Academic Success*

A confirmatory factor analysis was conducted on the scale, *Perceived Academic Success*, derived from Question 11 on the survey. Analyses using this scale revealed:

- A significant difference existed in the overall test for means for Students by sexual identity and disability status for Undergraduate Student respondents on *Perceived Academic Success*. No significant differences existed for Graduate Student respondents.
- LGBQ Undergraduate Student respondents had a lower *Perceived Academic Success* score than Heterosexual Undergraduate Student respondents.
- The Undergraduate Student respondents who indicated No Disability had a higher *Perceived Academic Success* score than Single Disability Undergraduate Student respondents and Multiple Disabilities Undergraduate Student respondents.

Key Findings – Opportunities for Improvement

1. Members of several constituent groups indicated that they experienced exclusionary, intimidating, offensive, and/or hostile conduct.

Several empirical studies reinforce the importance of the perception of non-discriminatory environments for positive learning and developmental outcomes.¹⁰

Research also underscores the relationship between workplace discrimination and subsequent productivity.¹¹ The survey requested information on experiences of exclusionary, intimidating, offensive, and/or hostile conduct.

- 17% ($n = 528$) of respondents indicated that they personally had experienced exclusionary, intimidating, offensive, and/or hostile conduct.¹²
 - 22% ($n = 118$) noted that the conduct was based on their gender/gender identity, 19% ($n = 101$) felt that it was based on their position status, and 19% ($n = 95$) felt that it was based on their ethnicity.
- Differences emerged based on gender/gender identity, position status, and racial identity:
 - By gender identity, a higher percentage of Transpectrum respondents (35%, $n = 22$) than Women respondents (17%, $n = 365$) or Men respondents (15%, $n = 131$) indicated that they had experienced exclusionary, intimidating, offensive, and/or hostile conduct.
 - 41% ($n = 9$) of Transpectrum respondents, compared with Women respondents 18% ($n = 66$) and 15% ($n = 20$) of Men respondents who noted they had experienced exclusionary, intimidating, offensive, and/or hostile conduct indicated the conduct was based on their gender identity.
 - By position status, 25% ($n = 97$) of Faculty respondents, 23% ($n = 46$) of Staff respondents, 22% ($n = 54$) of Administrator respondents, 11% ($n =$

¹⁰Aguirre & Messineo, 1997; Flowers & Pascarella, 1999; Pascarella & Terenzini, 2005; Whitt, Edison, Pascarella, Terenzini, & Nora, 2001

¹¹Silverschanz, Cortina, Konik, & Magley, 2008; Waldo, 1999

¹²The literature on microaggressions is clear that this type of conduct has a negative influence on people who experience the conduct, even if they feel at the time that it had no impact (Sue, 2010; Yosso, Smith, Ceja, & Solórzano, 2009).

37) of Graduate Student respondents, and 15% ($n = 294$) of Undergraduate Student respondents believed that they had experienced exclusionary conduct.

Of those respondents who noted they had experienced exclusionary conduct, a higher percentage of Staff respondents (52%, $n = 24$) and Administrator respondents (44%, $n = 24$) thought that the conduct was based on their position status, compared with Faculty respondents (19%, $n = 18$), Undergraduate Student respondents (11%, $n = 33$), and Graduate Student respondents ($n < 5$).

- o By racial identity, significant differences emerged with White respondents (16%, $n = 320$) indicating that they had experienced exclusionary, intimidating, offensive, and/or hostile conduct within the past year less than Multiracial Respondents (21%, $n = 46$) and Respondents of Color (19%, $n = 135$).

Of those respondents who reported experiencing this conduct, higher percentages of Multiracial Respondents (28%, $n = 13$) and Respondents of Color (43%, $n = 58$) than White respondents (7%, $n = 21$) believed the conduct was based on their race.

Respondents were offered the opportunity to elaborate on their experiences of exclusionary, intimidating, offensive, and/or hostile conduct at Salem State University. Fifty-four students, faculty, and staff contributed comments regarding their personal experiences. Twenty-five respondents elaborated on the types of disrespectful conduct that they reported. Forty-eight respondents described a lack of follow-through after reporting.

2. Several constituent groups indicated that they were less comfortable with the overall campus climate, workplace climate, and classroom climate.

Prior research on campus climate has focused on the experiences of faculty, staff, and students associated with historically underserved social/community/affinity groups (e.g.,

women, People of Color, people with disabilities, first-generation students, veterans).¹³

Several groups at Salem State indicated that they were less comfortable than their majority counterparts with the climates of the campus, workplace, and classroom.

- By racial identity: a significantly smaller proportion of Respondents of Color (47%, $n = 327$) were “comfortable” with the overall climate at Salem State than were White respondents (53%, $n = 1,102$). A higher percentage of White Faculty and Student respondents (30%, $n = 522$) were “very comfortable” with the climate in their classes than were Faculty and Student Respondents of Color (23%, $n = 145$).
- By sexual identity: a smaller percentage of LGBTQ respondents (22%, $n = 99$) felt “very comfortable” with the overall climate than Heterosexual respondents (30%, $n = 603$).
- By disability status: a higher percentage of No Disability respondents (25%, $n = 633$) than Respondents with a Single Disability (19%, $n = 62$) were “very comfortable” with the overall climate. A higher percentage of respondents with No Disability (30%, $n = 635$) than respondents with a Single Disability (21%, $n = 62$) and respondents with Multiple Disabilities (21%, $n = 37$) were “very comfortable” with the classroom climate.

3. Faculty and Staff/Administrator Respondents – Challenges with work-life issues

- 46% ($n = 182$) of Faculty respondents, 42% ($n = 82$) of Staff respondents, and 56% ($n = 137$) of Administrator respondents had seriously considered leaving Salem State in the past year.
 - 47% ($n = 187$) of those Faculty, Staff, and Administrator respondents who seriously considered leaving did so because of limited opportunities for advancement.
 - 45% ($n = 179$) of Faculty, Staff, and Administrator respondents each indicated that they did so because of lack of instructional support and/or low salary/pay rate.

¹³Harper & Hurtado, 2007; Hart & Fellabaum, 2008; Norris, 1992; Rankin, 2003; Rankin & Reason, 2005; Worthington, Navarro, Loewy, & Hart, 2008

- By faculty status: 54% ($n = 122$) of Tenure/Tenure-Track Faculty respondents and 36% ($n = 55$) of Adjunct Faculty respondents seriously considered leaving Salem State.
- By staff status: 50% ($n = 63$) of AFSCME Staff respondents and 27% ($n = 19$) of NUC/Chartwells/Contract Staff respondents seriously considered leaving Salem State.
- By citizenship status: 49% ($n = 349$) of U.S. Citizen Employee respondents and 38% ($n = 41$) of Not-U.S. Citizen Employee respondents seriously considered leaving Salem State.
- By religious/spiritual identity: Employee respondents with No Religious/Spiritual Identity (54%, $n = 145$) and Christian Employee respondents (41%, $n = 157$) seriously considered leaving Salem State. Employee respondents with Multiple Religious/Spiritual Identities (55%, $n = 24$) and Employee respondents with Additional Religious/Spiritual Identities (46%, $n = 38$) were not statistically different from the other two groups.

4. Faculty Respondents – Challenges with faculty work

- 21% ($n = 81$) of Faculty respondents thought that salaries for tenure-track faculty positions were competitive and 19% ($n = 70$) thought that salaries for adjunct/full-time temporary professors were competitive.
- 8% ($n = 31$) of Faculty respondents “strongly agreed” or “agreed” that child care benefits were competitive.
- 32% ($n = 72$) of Tenured and Tenure-Track Faculty respondents thought that tenure standards/promotion standards were applied equally to faculty in their schools/division and 14% ($n = 31$) of Tenured and Tenure-Track Faculty respondents believed that Salem State faculty who would benefit from delaying their tenure-clock felt empowered to do so.
- 19% ($n = 42$) of Tenured and Tenure-Track Faculty respondents believed that faculty opinions were taken seriously by senior administrators.

- 25% ($n = 43$) of Non-Tenure-Track Faculty respondents “strongly agreed” or “agreed” that the criteria used for contract renewal was applied equally to all positions.
- 28% ($n = 44$) of Non-Tenure-Track Faculty respondents felt that their academic advising was valued.
- 32% ($n = 52$) of Non-Tenure-Track Faculty respondents felt that their opinions were taken seriously by senior administrators (e.g., chair, dean, provost).
- 15% ($n = 24$) of Non-Tenure-Track Faculty respondents “strongly agreed” or “agreed” that they have job security.

Ninety-Six Staff/Administrator respondents contributed comments regarding their employment-related experiences. Three themes emerged from these comments: 1) lack of advancement opportunities and professional development, 2) salary imbalances and workload, and 3) short-comings of leadership,

When asked to elaborate on their responses, Tenured and Tenure-Track Faculty respondents noted inconsistent expectations in service and inclusion concerns based on race and sexuality. Non-Tenure-Track Faculty respondents described concerns with job security and a low sense of belonging. Faculty respondents, in general, described challenges with funding for research and professional development, as well as, dissatisfaction with their salaries.

5. A small, but meaningful, percentage of respondents experienced unwanted sexual conduct.

In 2014, *Not Alone: The First Report of the White House Task Force to Protect Students from Sexual Assault* indicated that sexual assault is a substantial issue for colleges and universities nationwide, affecting the physical health, mental health, and academic success of students. One section of the Salem State survey requested information regarding sexual assault.

- Two hundred and forty (8%) respondents indicated that they had experienced unwanted sexual conduct while at Salem State.

- 1% ($n = 39$) of respondents experienced relationship violence (e.g., ridiculed, controlling, hitting) while a member of the Salem State community.
- 2% ($n = 71$) of respondents experienced stalking (e.g., physical following, on social media, texting, phone calls) while a member of the Salem State community.
- 5% ($n = 142$) of respondents experienced unwanted sexual interaction (e.g., cat-calling, repeated sexual advances, sexual harassment) while a member of the Salem State community.
- 2% ($n = 53$) of respondents experienced unwanted sexual contact (e.g., fondling, rape, sexual assault, penetration without consent) while a member of the Salem State community.
- Over half of the Undergraduate Student respondents who had indicated they had experienced unwanted sexual conduct of any type reported that it occurred during their first year and often during the first semester.
- Higher percentages of Non-Transfer Student respondents, Women and Transspectrum respondents, LGBQ respondents, U.S. Citizen respondents, Respondents with Multiple Disabilities, Respondents with a Single Disability, and Campus Housing Student respondents reported experiencing unwanted sexual conduct of any type than their colleagues.
- Eighty to ninety percent of respondents who experienced unwanted sexual conduct did not report it.

Respondents were offered the opportunity to elaborate on why they did not report unwanted sexual experiences. Five themes emerged: 1) fear of blame, 2) belief nothing would be done, 3) conduct was insignificant, 4) conduct was significant, but commonplace, and 5) lack of support.

Conclusion

Salem State University climate findings¹⁴ were consistent with those found in other higher education institutions across the country based on the work of R&A Consulting.¹⁵ For example, 70% to 80% of respondents in similar reports found the campus climate to be “comfortable” or “very comfortable.” A similar percentage (75%) of Salem State respondents reported that they were “very comfortable” or “comfortable” with the climate at Salem State. Likewise, 20% to 25% of respondents in similar reports indicated they personally had experienced exclusionary, intimidating, offensive, and/or hostile conduct. At Salem State, a lower percentage of respondents (17%) indicated that they personally had experienced exclusionary, intimidating, offensive, and/or hostile conduct. The results also paralleled the findings of other climate studies of specific constituent groups offered in the literature.¹⁶

Salem State’s climate assessment report provides baseline data on diversity and inclusion and addresses Salem State’s mission and goals. While the findings may guide decision-making in regard to policies and practices at Salem State, it is important to note that the cultural fabric of any institution and unique aspects of each campus’s environment must be taken into consideration when deliberating on additional action items based on these findings. The climate assessment findings provide the Salem State community with an opportunity to build upon its strengths and to develop a deeper awareness of the challenges ahead. Salem State, with support from senior administrators and collaborative leadership, is in a prime position to actualize its commitment to promote an inclusive campus and to institute organizational structures that respond to the needs of its dynamic campus community.

¹⁴Additional findings disaggregated by position status and other selected demographic characteristics are provided in the full report.

¹⁵Rankin & Associates Consulting, 2015

¹⁶Guiffrida, Gouveia, Wall, & Seward, 2008; Harper & Hurtado, 2007; Harper & Quayle, 2004; Hurtado & Ponjuan, 2005; Rankin & Reason, 2005; Sears, 2002; Settle, Cortina, Malley, & Stewart, 2006; Silverschanz et al., 2008; Yosso et al., 2009

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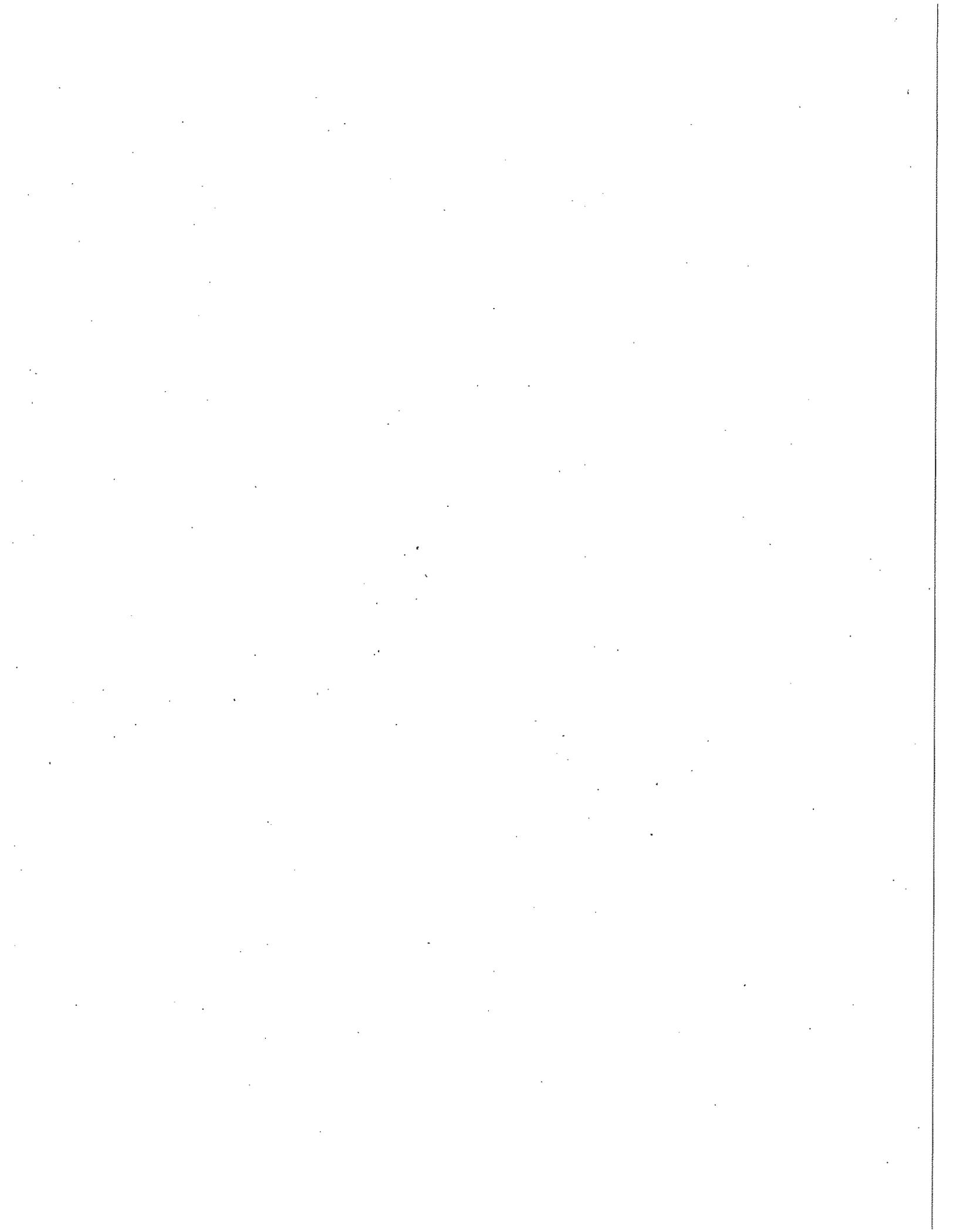
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STRATEGIC PLAN

NOVEMBER 9, 2017

EXECUTIVE SUMMARY

This Salem State University strategic plan concludes a transparent and inclusive campus-wide planning process led by the institution's Collaboration Committee. Through this strategic plan, we affirm the university's mission and vision, and present expanded core values. The university takes pride in our gains towards the Massachusetts Board of Higher Education (BHE) system goals of college participation, college completion, and closing achievement gaps. Of equal importance in accomplishing these goals has been a commitment to authentic teamwork, an openness to sincere dialogue, and the discernment and engagement required to undertake systemic change.

The strategic plan presented in this document builds on these important gains, learns from both successes and failures, is tempered by internal and external realities, and confidently presents bold yet feasible strategic priorities that align with our institution's strengths and the North Shore's and the Commonwealth's educational, economic and workforce needs.

Salem State's four strategic goals are:

Financial Vitality: Strengthen Salem State's financial foundation, align resources with priorities, and foster innovation to drive new revenue streams. Identify and implement additional opportunities to contain, reduce, or avoid future growth in costs. We must continue to work towards establishing a stronger financial base, by strategically growing enrollment, diversifying program delivery, and generating new sources of revenue. Current Business Intelligence efforts will provide the roadmap.

Collaboration, Inclusion and Stewardship: Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship. The pace of change in higher education requires a coordinated, committed and collaborative process of relationship- and trust-building among faculty, staff, students and external partners. The Campus Climate Study¹ results will help guide us.

Academic Excellence: Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society. Our continued successes in academic excellence require support for faculty development in aid of pedagogical and

curricular innovation (including alternative modes of course delivery), as well as greater connection to regional opportunities for experiential learning, continuing scholarship, and civic engagement.

Student Success: Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals. We aim to foster a supportive environment for student growth in the context of the North Shore's shifting demographics and evolving economic trends, with an eye toward providing more nimble responses to the needs of our students and their future employers.

Implementing these four goals will lead to success in these areas:

BHE "Big Three": Salem State University will continue to boost college participation by strategically increasing enrollment, via expanded partnerships and articulations with PK-12 districts and community colleges and strategic growth in regional high-demand academic programs. Similarly, college completion rates will continue to increase due to improved academic advising and student success programming. Moreover, the university will build on its success of closing achievement gaps by focusing resources on the programmatic areas with highest impact.

Inclusive Excellence: Focused attention the principles of inclusive excellence, which promotes a more just and equitable society, supports our institutional mission as operationalized both on our campus and in our region. Moreover, success in achieving the BHE Big Three goals critically depends on a campus climate in which diversity (in its many forms) is acknowledged, valued, celebrated, and integrated into the entire college-going experience. The recommendations from the Campus Climate Study will provide a roadmap to being a welcoming, accessible, student-centered, high-quality academic institution.

Science & Healthcare on a Liberal Arts Foundation: Salem State's focus on science and healthcare as firmly grounded in the liberal arts acknowledges the ways in which the university's current strengths and future opportunities are well aligned to the industry strengths and workforce needs of North Shore and Greater Boston regions. Our academic programs in these areas are limited by the condition and flexibility of our physical space. To foster greater student success in these academic domains, the university must continue to extend its regional business partnerships to increase the number of internships and opportunities for student and faculty research.

Place: Salem State is the North Shore's university. Every program, department and public space on campus is regionally engaged through teaching, research, civic engagement, service contracts and cultural events. In pursuit of promoting academic excellence (including the BHE Big Three), Salem State will focus its economic, cultural, social, and workforce engagement in collaboration with regional planning to sharpen impact and wisely leverage local resources.

Civic Responsibility: Salem State seeks to build upon its historic commitment to social justice and civic engagement. The university will continue to be an exemplar for civic leadership statewide, regionally, and nationally with the intention of achieving the Carnegie Community Engagement Classification.ⁱⁱ

PLANNING PROCESS

Salem State University's strategic planning process started in the spring of 2016 with the university's Collaboration Committee accepting the assignment of campus-wide strategic planning as its charge for AY2017. The committee enthusiastically accepted the role to facilitate an inclusive process for collecting the campus community's ideas and recommendations and distilling them into a four-year strategic plan. The committee was led by then Assistant Dean Nate Bryant and Professor Monica Leisey, with Chief of Staff Beth Bower and Executive Director of Strategic Planning and Decision Support Chunju Chen serving *ex-officio*. Linda Campanella, SOS Consulting, was engaged to assist the committee and work started in July 2016 to assure that all aspects of the Salem State community had input. The committee updated to the president, the President's Executive Council (PEC) and the President's Leadership Cabinet. In addition, Board of Trustees Chair Paul Mattera appointed Trustee Kathy Murphy (SSU '75) as liaison to the strategic planning process.

In the fall of 2016 the planning process focused on assessment, reflection, and visioning. The campus community was first invited to reflect on the successes and unaddressed opportunities of the 2013 - 2017 Strategic Plan. Next, internal and external data were examined, including a number of recently administered student surveys, the Salem State Vision Project Dashboard, our Peer & Aspirant Institution comparative data, and our Board of Trustees Scorecard.

The Collaboration Committee then led an intense and inclusive outreach process to ensure key stakeholders would have multiple opportunities to provide input to assure a shared vision and goals. During the fall of 2016, the SSU community participated in well over 2,000 touch points and engagement opportunities. This broad process was used to craft a consensus on strategic strengths and weaknesses. Through this process our mission was confirmed. It also articulated the university's core values, a new vision statement, and a slate of preliminary goals, each of which were presented to the President's Leadership Cabinet, the campus community, and the Board of Trustees in January 2017. In February, task forces were convened and offered further language and strategies for consideration by the Collaboration Committee and the PEC.

The current product reflects this comprehensive input guided by the PEC's effort to prioritize future work and to ensure a comprehensive strategic positioning for the university. The work between the Collaboration Committee and the PEC has "pivoted." Initially, the role of the Committee was to gather, synthesize, and analyze input from the campus community and develop a preliminary set of goals and strategies. The Committee served as a broad-based focus group during the refinement and

prioritization of the plan that ensured that the input of the campus community remained the foundation of and provided direction to the final plan.

OUR MISSION

Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society, and serve as a resource to advance the region's cultural, social, and economic development.

OUR VISION

Salem State University will be a premier teaching university that engages students in an inspiring transformational educational experience.

- We put students first in all that we do and are committed to their success.
- We are a community of learners where all faculty, staff, and students have the opportunity to grow as individuals.
- We are innovators, offering a unique brand of public higher education that inspires students to reach higher and achieve more.
- We remain true to our heritage as a liberal arts university while we prepare students for today's workforce.
- We serve the communities of the North Shore while we create an ever more globally aware and culturally diverse campus environment.

OUR CORE VALUES

At Salem State University, two fundamental commitments unite and motivate us in daily pursuit of our mission:

1. **Academic excellence:** We cultivate an intellectually vibrant community led by a faculty dedicated to excellent teaching and enriched by students eager to learn and meet high standards of excellence.
2. **Student success:** We put students first in all that we do and are committed to fostering success in their studies, careers, and life.

We hold the following core values as a public university whose foundation is the liberal arts tradition:

- **Access:** We have a long history of, and deep commitment to, providing a pathway to college participation and completion for first-generation college students and others who may consider this goal beyond reach.

- **Civic engagement:** We forge mutually enriching relationships with, and contribute to, the cultural and economic vitality of our region, the Commonwealth of Massachusetts, and the global community.
- **Inclusion:** We promote an inclusive campus environment that respects human differences, welcomes and celebrates diversity, promotes global awareness, and inspires students, faculty, and staff to be champions of social justice and the common good.
- **Innovation:** We strive to provide a fertile and adaptive environment where entrepreneurial thinking and pioneering approaches flourish.
- **Scholarship:** We support research and creative endeavors that inform or inspire others, expand knowledge and academic disciplines, and connect us with the wider world.
- **Stewardship:** We encourage responsible use and cultivation of resources—human, physical, environmental, and financial.
- **Well-roundedness:** We promote development of a broad range of intellectual, personal, and practical skills and habits of mind by offering educational programs and applied learning opportunities grounded in the liberal arts tradition and geared toward 21st-century careers.

CONTEXT

ENVISIONING SALEM STATE IN FOURth YEARS: BUILDING A SOLID FOUNDATION

Salem State University **today** is a thriving institution and caring campus community distinguished by:

- academic quality and achievement;
- a student-centered approach to teaching and learning;
- deep roots in the liberal arts tradition;
- a strong, enduring commitment to diversity and social justice dating back to the university's connections with early abolitionists;
- a dedicated faculty, staff, and students who strive to do and be their best; and accomplished alumni who are making a difference in their professions, their communities, and the wider world.

We **reaffirm** Salem State's identity as a teaching institution and our belief that undergraduate education is the cornerstone of our mission. Simultaneously, we embrace and continue to lean into the opportunities and responsibilities associated with Salem State's evolution from college to university. Graduate education and faculty scholarship, which we define broadly and inclusively, are central to the enterprise. We balance the need to be responsive to workforce needs with an unwavering commitment to an educational experience firmly grounded in the liberal arts.

Our commitment to academic freedom, equity and access, affordability, inclusivity, civic engagement, social justice, student-centeredness, and sense of community that gives Salem State a small-college feel is unwavering, and we will continue to uphold and leverage these defining distinctions as we move forward. Equally strong is our bedrock commitment to serving students from traditionally under-represented and under-served backgrounds, educating and mentoring them, and improving their social mobility. We steadfastly believe a university education can, and should, change an individual's options, opportunities, and overall life trajectory.

THE FUTURE

Building on our strengths, **four years from now** Salem State will continue to be a thriving, welcoming, inclusive, adaptive university that graduates well-rounded, comprehensively educated, civically minded, socially conscious individuals ready to tackle whatever challenge comes their way; they will be motivated to engage in addressing societal problems that affect the common good and will be well-prepared to succeed and lead in their careers and communities. Resulting in part from enhanced academic advising and a strategic focus on student transitions, engagement, and wellness, Salem State will make robust gains in retention and completion rates and closing the achievement gap between majority and under-represented student populations.

The university will be even more widely recognized and respected for programmatic centers of excellence in science, healthcare and the “helping professions” (human services) as well as for its leadership in the realm of diversity and inclusion. Undergraduate, continuing education, and graduate studies will be well integrated, and academic programs will respond to evolving needs of students and the workplace they will enter, including workplaces that now consider a professional doctorate to be the capstone degree for entry-level positions. Salem State will be leveraging its location in historic Salem, on the North Shore of Massachusetts, and in proximity to the state's capital in ways that distinguish the university's program, enhance the educational experience of students, and contribute significantly to the region by promoting wellbeing and prosperity, safeguarding local resources, and advancing economic growth. The university's role and contributions in the realm of economic development will be more obvious and more important than ever.

Seeking to be all it can be – but not aspiring to be all things to all people – the university will have engaged in thoughtful institutional discernment about how most effectively to invest and deploy limited resources in order to maximize impact. The campus community through shared governance will make tough choices relating to (i) where to pursue intentional growth based on competitive advantage or community need, and (ii) how to leverage opportunities to go deeper in order to enhance impact rather than go wider in order to expand reach. As a result of new and expanded programs that generate enrollment-driven revenue and diversification of revenue sources (e.g., expanded summer conference operations), Salem State will be more financially stable and thus able

to invest more fully in its mission, in its students, and in realizing its potential as a great public university.

Recruitment best practices, clarity of expectations, and focus on cultural sensitivity will have resulted in improved diversity, productivity, and satisfaction among faculty and staff. Employees will increasingly appreciate working in a highly effective and inclusive environment that promotes shared responsibility and instills a leadership culture on campus at all levels. Promoting student success will be seen as everyone's "job," and an understanding and application of growth mindset not only to close achievement gaps, but also to promote employee growth, will be deeply embedded in the university's culture

STRENGTHS ANALYSIS

From 2013 – 2017 the university's priorities focused on student success, aligning with the Massachusetts Board of Higher Education's (BHE) "Big Three": college participation, closing achievement gaps and college completion, all with particular emphasis on students from underserved populations. Historically the *most diverse* institution among the state universities, SSU is focused on the recruitment, retention and graduation of *all* of our students. Salem State attracts most of its degree-seeking undergraduates from the culturally and economically diverse cities and communities located north and west of Boston. The majority of entering first year students are first-generation (over 60 percent in 2015), with significant numbers who are Pell-eligible (40 percent among FTFT students in 2015), and students of color (35 percent of first year students in 2016). Achievement gaps for students of color, first generation and low-income students nationally underscore the critical importance of addressing barriers to enable more students to succeed, especially students from communities that have been historically underrepresented in higher education.

To boost college participation, the university partners with regional and Boston-area high schools and non-profits, as well as works closely with Bunker Hill Community College, North Shore Community College, Northern Essex Community College and Roxbury Community College on facilitating the critical transition between the two-year and four-year institutions. To increase retention and completion, strategic investment in programmatic initiatives have included creation of a First Year Experience program (including a campus-wide common reading initiative and a spectrum of First Year Seminars); establishment of the Center for Academic Excellence, a one-stop center for academic support services (advising, tutoring, supplemental instruction); transformation of the university's general education curriculum, including an overlay that addresses issues of diversity, power dynamics, and social justice; implementation of the early warning retention system "MAPWorks ("Making Achievement Possible"); and consolidation of offices devoted to "the business of being a student" in a centralized (and nationally- recognized) Student Navigation Center. These efforts have borne fruit: in 2007, Salem State's six-year first-time, full-time completion rate was 37 percent. In 2016, the completion rate had risen 15 percentage points to 52 percent.

The university's recent successes are all the more noteworthy in the face of a challenging demographic context. Despite declining high school graduation rates in the northeast, Salem State's enrollment remains relatively level with 1,145 freshmen in 2016 and increased overall applications and admits. Retention rates are stable at 80 percent. Six-year graduation rates increased to 52 percent, while four-year graduation rates grew to over 39 percent. Arts and Sciences scholarships were offered for select programs with the potential to grow. We have made great strides in traditional measures of student success at the undergraduate level. While our headcount of students has remained level, the diversity of our population continues to expand. In the fall of 2016, 34 percent of our entering class self-identified as students of color. We are closing the achievement gaps between our white students and students of color.

In pursuit of these institutional successes, the university has made a number of strategic investments. For example, the Center for Academic Excellence provides academic support services, including advising, tutoring, mentoring, supplemental instruction, reading and test-taking strategies. The office also collaborates with other departments to ensure that students have the appropriate academic supports to be successful. CAE support services were accessed by nearly 8,000 students last year. These services and the respective numbers of students using them include advising (over 5,000), tutoring (nearly 1,500), and mentoring (nearly 500). In addition, programs supporting low-income and underrepresented populations, such as the Summer Bridge Academy and TRIO Support Services, are also under the CAE umbrella.

In 2016 the president, on the recommendation of the President's Advisory Council on Diversity, Affirmative Action, Equity and Social Justice (PAC-D), created the office of Inclusive Excellence, and hired the university's first vice president of Inclusive Excellence. Academic Affairs, Human Resources and Equal opportunity, and the office of Inclusive Excellence have collaborated on putting in place guidelines and strategies for the recruitment of diverse staff and faculty and a bias incident reporting protocol.

Student life's diversity and multicultural affairs office offers mentoring programs with faculty fellows supporting underrepresented students. The Brotherhood is an academic success and retention program offered to support self-identified men of color, while BEES (Bold, Educated, Empowered Sisters) is a similar program to support empowering women of color. *INSIGHT into Diversity* magazine recently awarded Salem State University with the 2017 Higher Education Excellence in Diversity (HEED) Award, a national honor recognizing U.S. colleges and universities that demonstrate an outstanding commitment to diversity and inclusion.

Salem State also has the largest number of international students among the state universities. A comprehensive campus-wide initiative to support international student success transformed the previously isolated, independent pockets of international activity on the campus into a coordinated effort. This multi-faceted, multi-disciplinary approach is infusing internationalization throughout the university's curriculum, campus climate, study abroad programs, visiting scholars, student

engagement, English as a second language programs, immigrant populations, international students, and community engagement.

The university was the only Massachusetts institution awarded a \$300,000 federal grant (2015) annually for three years from the Department of Justice's Office on Violence Against Women. With these funds a campus office was created and staffed by a professional and a graduate assistant to reduce sexual and relationship violence and stalking on campus, enhance victim services, increase prevention and education, and strengthen campus security.

To support the academic, enrollment management, and student life initiatives, administrative departments also undertook key initiatives. Salem State is committed to capital planning that engages the campus and the broader external community. The university completed a 2040 Master Vision plan^{iv} in 2013 that provided a roadmap for capital improvements to support academic excellence and student success. In the past five years, capital projects focused on promoting student success and improving the student experience with the construction of a new library and learning commons, two residence halls, a fitness center, a student navigation center, and a student parking garage. Our expanding School of Social Work was moved to new quarters and the nationally recognized Salem State Theater Department now has a 21st century theater complex.

Over the past three years the university has improved its financial management and operations to meet the needs of this increasingly complex comprehensive university. Organizational restructuring, improved business processes, and transactional systems have been achieved. The creation of a multi-year, data-driven financial planning and execution process are helping to align our resources with strategic imperatives to promote long-term financial stability. The budget is now prepared on an All Funds basis and an updated set of financial benchmarks is in use to assess the institution's financial situation year over year. Work in progress includes development of sophisticated business intelligence analytical tools to assess academic program net margin contribution via integration of data from the disparate student, HR, and financial systems. In FY17 a first-ever, multi-year financial projection (MYFP) was created. As strategic plan initiatives are developed, they are being quantified and layered into the baseline to provide a holistic financial understanding of the future state of the university.

The recruitment of an executive director of strategic planning and decision support in 2015 has significantly improved the university's collection and understanding of data and data management to support analysis of trends and needs. Her collaboration across divisions is focused on using data to inform decision-making in an intentional and consistent manner. Recent examples include new academic program decisions, focused work in the area of academic assessment, and further development of information technology governance and capital project governance processes.

In addition, the university successfully reviewed and received BHE approval for a number of undergraduate and graduate degree programs. The university has again identified areas of academic

strength that respond to statewide and regional needs and opportunities. This was accomplished through a data-driven process that considered BHE data, enrollment trends, market analysis, demographic data, student success information, and programmatic evaluations.

Salem State University always operates with an eye on efficiency and financial prudence, in addition to effectiveness and quality objectives inherent in our operations and activities. We are mindful of the importance of growing revenues other than tuition and fees. Partnerships with external vendors continue to help diversify and increase our revenues. Commissions and other contributions from auxiliary service provider partners generate significant funding for the university. And, a capital campaign led by institutional advancement successfully raised over \$26.5 million, comfortably exceeding the \$25 million goal. Over 12,000 alumni, friends, faculty, students and staff contributed to the 10,000 Reasons campaign. It is of note that the internal campus portion of the campaign brought in \$3.7M with 94 percent support from faculty and staff.

WEAKNESSES ANALYSIS

Although the 2008 Higher Education bond bill had bond capacity to address the delay in upgrading Salem State's scientific laboratory infrastructure funding was only released for the study. This study confirmed the need for a Science Teaching Laboratory Addition to meet student and industry demand for science and healthcare degrees and credentials. Construction of the proposed Science Teaching Laboratory Addition will serve the ever increasing population of regional students seeking biology, chemistry, healthcare and nursing degrees. Our highest demand program is nursing, and Salem State's other health programs are important workforce growth areas that are experiencing increasing student interest. Biology and chemistry are strong and positioned for expansion. However, the university is lacking the laboratory facilities that meet current industry standards and accommodate this growth. Without increases in enrollment (count), the need to cover labor and facility-related expense growth with revenue growth places pressure on prices (rates) that is counter to our imperative to provide reasonable cost offerings to our students in fulfillment of our mission.

As one of the state universities with the highest concentrations of students who are Pell-eligible, student need routinely exceeds available resources. Consequently, the university delivers intensive outreach to students and their families throughout the recruitment process and those on-going retention efforts increase financial literacy. These continuous campaigns were systematized in 2015 to insure that student decision-making is informed and that students have adequate financial resources to achieve their educational goals throughout their academic career. In order to leverage the institutional and individual student benefit from the application of financial aid resources, Salem State initiated an in-depth, multi-year analysis of the impact of aid disbursements in 2017. This study will yield predictive analytics to guide the institution in targeting financial resources to those students with the most need, as well as the greatest likelihood of retention and completion, based on a number of factors.

The business model in higher education is increasingly challenged; Salem State is not immune. Annual increases for the majority of employee salaries and fringe benefits are not controlled by the university. In addition, the decrease in the population of college age students in Massachusetts (and beyond) have led to lower/flat enrollment growth statewide, creating a non-sustainable financial pattern. In addition, the university's investments in its physical plant to support student success and academic excellence have resulted in higher annual debt service, lease, and depreciation expenses. The Commonwealth (DCAMM) and the university recognize that significant deferred maintenance exists.

As noted under strengths, the university has re-organized multiple departments to increase efficiencies, break down traditional silos within the organization, and provide more streamlined, effective programs and services for students. These on-going changes take time, collaboration and negotiation. Uniting multiple offices to focus on clear, common goals, however, provides the leverage needed to foster continuous improvement and constructive change for students. While these transformations have increased collaboration and efficiencies, the opportunity to yield even greater benefits for students grows with more time.

As the demographics of the Commonwealth have changed in the past generation, so too has the makeup of Salem State's student body. While we now educate the most diverse student population among the nine state universities, our faculty/staff demographics have not kept pace. Because this lack of congruence between the student body and the faculty/staff has an impact on the teaching-learning enterprise, we are currently working intentionally and aggressively to bring these demographics into better alignment. Similarly, recent shifts in students' academic interests and workforce needs have created instances in which faculty/staff expertise is not always optimally aligned with areas of high programmatic demand.

On our campus, as in society, the individual student experience can vary greatly due to many factors. The university has initiated Inclusive Excellence training and improving bias reporting procedures to minimize the occurrence of micro and macroaggressions, as well as to respond swiftly and directly when they do happen. Mindful of the strength of our campus diversity and the power of constructive engagement, President Keenan has championed what he calls, "The Salem State Way," as a means to call the campus to engage in difficult discussions, honestly, openly, and respectfully.

While collaboration across campus has increased, the university community is in agreement that much more can be done. The understanding and implementation of a shared vision of Inclusive Excellence has only begun. In the spring of 2016 the president engaged Rankin and Associates Consulting, a nationally recognized firm that provides institutions with an examination of their current campus culture and provides a plan to lay the groundwork for future initiatives, leading to institutional transformation via maximizing equity. The firm worked with a campus climate working group to conduct a study for Salem State. Dr. Rankin presented the results of the study to the

campus in early November and an implementation team will continue to work with the campus community to transform the recommendations into actions.

Collaboration on the strategic planning process was successful, but the campus must embrace the university's goal of a culture of data-driven decision-making. More work is needed in putting the rubrics, data-collection, and analytical tools in place to create a stronger culture of assessment throughout the university. Providing increased employee/faculty training and professional development opportunities will be key to success, as well as strong leadership throughout the organization.

OPPORTUNITIES ANALYSIS

Students build self-esteem and critical social capital by learning and living in a diverse, inclusive community, enabling them to achieve their academic goals and increasing graduation rates. Employers value students with cultural competency skills and the ability to work effectively in teams. As the most diverse of all state universities, Salem State is working diligently to leverage this asset. Seniors and first-year students report that the university places an “emphasis on encouraging contact among students from different backgrounds,” at a rate 12 percent higher than among peer institutions (NSSE 2016.)

Preparing graduates to transition to their roles as productive citizens, contributing to the economy, is a critical goal for the institution, as well as for students, families, and the Commonwealth. The university recognizes the high-impact benefits of internships and experiential learning in preparing students for the work place. However, the proliferation of internship opportunities across campus with widely varying expectations, policies, and practices, has made it challenging to make such experiences consistently accessible, sustainable, and assessable. While internships create rich learning opportunities for students, the expansion of such opportunities has been challenging to manage systematically. As a result, the university must establish greater clarity in expectations for internships as we move toward establishing signature internship programs and better mechanisms to prepare and supervise students in such environments.

Through increasing the university's ability to oversee internship programs more systematically, the resources devoted to promoting and developing internships could yield greater benefits for students and the community, as the institution becomes a more consistently reliable partner in the process. Thus, opportunities abound for greater collaboration within the university and with the external community, including alumni, businesses, and non-profits, to create and promote internships and to offer a more streamlined and seamless experience for students, faculty, and community supervisors.

Graduate enrollment is strong and growth opportunities exist, particularly as professions impose new educational requirements on practitioners (masters in social work, masters in accountancy, masters of science in athletic training, and a clinical doctorate in occupational therapy all build on

existing, strong programs). Another opportunity the university is pursuing to meet the Commonwealth's goals to increase the educational level of the workforce is degree completion programs.

Future demographic and enrollment trends offer the opportunity for Salem State to explore the benefits and possibility of Hispanic Serving Institution (HSI) designation. The university is well-positioned to capitalize on this opportunity to serve the North Shore, through its focus on Inclusive Excellence. Programmatic initiatives in this area include, supporting student diversity, engaging the campus in developing cultural competencies, diversifying university faculty and staff, and eliminating barriers to success identified through the Campus Climate Study.

Increasing partnerships/couplings/articulations with PK-12 districts, community colleges, University of Massachusetts Lowell, and independent institutions in the region demonstrates the university's and public education's significance as a driving force for prosperity on the North Shore. Salem State works closely with the Salem Public Schools throughout the school year and hosts an elementary school on campus. The university also works with other cities including Lynn and Revere to provide both teacher education and programmatic support. And Salem State has a 20-year Upward Bound partnership with the city of Lawrence, including hosting summer residential programs on campus.

Moreover, the growing strength of partnerships with community colleges through collaborative programs such as the Commonwealth Compact, CommUniverCity, and the Early College PIF Grant, highlight Salem State as a destination for students regionally. In addition, administrative efforts to increase transfer pathways through MAST, Mass Transfer, and dual admissions agreements with regional community colleges (Bunker Hill Community College, North Shore Community College and Northern Essex Community College), which go beyond deferred admissions, serve to streamline opportunities for students and increase shared institutional enrollments.

Salem State University continues to strengthen its alignment and collaboration with the business, cultural, economic, and workforce strengths and needs of the North Shore region. Historically Salem State has partnered with businesses and non-profits to respond to workforce needs; to provide academic research for regional issues relative to economic development, sustainability and historic and cultural resources. Recently, Salem State has become involved in local and regional issues such as Youth at Risk, civic responsibility, veterans' support, LGBTQ rights, and addiction recovery. Additional partnerships and leadership include Salem State's central role in the founding and development of the North Shore Alliance for Economic Development and the university's Enterprise Center which houses and supports start-up and small businesses.

The university maintains signature partnerships with a wide variety of employers. Among these signature partnerships, are relationships with businesses in the area of accounting, the life sciences,

information technology, finance, and management. A specific example of Salem State leveraging its academic expertise to the benefit of regional and statewide economic development is the Cat Cove Marine Laboratory in Salem, which serves not only the North Shore, but many coastal communities throughout Massachusetts. In partnership with the Commonwealth, the laboratory produces seed clams which are distributed to cities and towns with dormant clam flats. Faculty and students participate in applied research and contribute to the sustainability of the coastal ecosystem. Cat Cove has partnered with Legal Sea Foods to establish a blue mussel long line aquaculture farm; the first offshore shellfish farm in federal waters on the Atlantic Coast and only the second in the U.S.

The university must expand the university's alternative modes of program delivery, including an increased focus on the credentialing needs of students. On-line offerings and alternative scheduling meet the needs of students who are returning to college later in life (post-traditional high school years), as well as students starting college while still in high school (early college efforts.) Salem State, similar to many sister institutions, serves not only first-time, full-time freshman students, but welcomes a significant number of transfer students from private colleges, public universities and community colleges.

Regionally, Salem State is a member of the Northeast Consortium of Colleges and Universities (NECCUM) through which students at member institutions (public and private) have the opportunity to take courses at and use the libraries of any of the NECCUM member institutions. The consortium is a venue for consultation with our region regarding programming opportunities. In addition, SSU is a partner in the Life Sciences Consortium of the North Shore, joining three other regional higher education institutions and North Shore Innoventures (a cleantech & biotech start-up incubator) to work collaboratively on advancing the tech community via workforce development, shared research space and instrumentation and research.

The university must continue to identify, cultivate and activate resources external to the campus community. First and foremost are our alumni, who live and/or work within our region. The recent capital campaign, the efforts of the Alumni Association, academic departmental engagement with their alumni, and the connections made with various student support offices such as the office of career services and athletics has increased stewardship opportunities. Collaboration towards shared external relational objectives will be one of the keys to overall success. Our alumni are also important to meeting our inclusion goals especially in recruiting faculty and staff and connecting with our students.

THREATS ANALYSIS

The Commonwealth has a number of important priorities vying for its limited resources. Available capital funding has proven inadequate to keep up with deferred maintenance or provide spaces of sufficient quality (suitability) and quantity to meet 21st century instructional needs. For Salem State, this is most urgently reflected in our lab sciences spaces, a critical challenge given the regional

workforce needs in the sciences and health-related fields. Securing funding for the Science Teaching Laboratory Addition is a high priority. Some of the university's physical academic infrastructure is obviously insufficient, which limits enrollment, faculty research and business partnership opportunities. Salem State has responded to the need for alternate delivery modes, such as on-line and hybrid. The university will be using the enrollment management, academic programming and marketing studies to identify additional opportunities for course delivery and the required academic technology infrastructure and faculty course design support needs.

The demographic decline in the Commonwealth's high school population will continue a downward trend in the foreseeable future. This has made the recruitment landscape increasingly challenging, though at present Salem State has been able to maintain a reasonably competitive position in an industry generally showing negative growth in New England. The strategies described above and below are key to serving future students successfully meeting the workforce needs of the Commonwealth and addressing the goals of the BHE's Big Three priorities.

STRATEGIC POSITIONING

BHE "BIG THREE" – Boosting College Completion; Closing Achievement Gaps; and Attracting and Graduating More Students from Underserved Populations

The proposed goals of Salem State's strategic plan include an emphasis on student success and academic excellence. In AY2007 Salem State had a first-time, full-time graduation rate of 37 percent; at the completion of AY2016 the rate rose to 52 percent. This achievement reflects the university's commitment to all students achieving their goal of earning a baccalaureate education. During this same period of time, achievement gaps closed with our African-American students achieving a 53 percent graduation rate and Latino students, a 42 percent graduation rate. Therefore, the university is confident the strategies in place to promote success are having a positive impact. The percentage of students of color in our student body has grown from 20 percent in AY2008 to 30 percent in AY2016; moreover, our entering class in fall of 2016 was 34 percent students of color, suggesting that the level of diversity will continue to rise. We are committed to continuing these trajectories of student access and success across all of our student populations including dual-enrollment, early college, transfer, and graduate students.

MAKING EXCELLENCE INCLUSIVE

Inclusive Excellence is Salem State's guiding principle for access, student success, and high-quality learning. This framework, adopted from the Association of American Colleges & Universities, helps Salem State integrate diversity, equity, and educational quality efforts into our mission and institutional operations. Making excellence inclusive is thus an active process for Salem State which responds to its historic mission of welcoming under-served diverse populations such as veterans, first-generation, ethnically and culturally diverse, LGBTQ, or individuals with disabilities. We will achieve excellence in learning, teaching, student development, institutional functioning, and

engagement in local and global communities. Inclusiveness and excellence are inter-dependent, as opposed to the traditional perspective that separates the two concepts. To practice inclusiveness is excellence; both are core values of the university.

SCIENCE & HEALTHCARE ON A LIBERAL ARTS FOUNDATION

Salem State has enjoyed a strong reputation for training students in science and healthcare disciplines, and has seen a decade of growth in these academic areas, despite limited facilities and a competitive marketplace. Nursing and biology are majors that are capped due to lack of adequate laboratory space. Nursing students are unable to take full advantage of simulation-based instruction because current facilities are limited in number. Clinical placements in many of the majors that requires them (nursing, occupational therapy) are increasingly difficult to secure, with looming threats by some healthcare partners to begin charging the university for each student placed. In partial response to these limitations, Salem State has added a healthcare studies program specifically designed for students interested in the healthcare and human service industry but who prefer to work in a non-licensed, non-clinical setting, further demonstrating the university's commitment to aligning its programs with one of Essex County's regional strengths and workforce needs. Critical to meeting these regional needs is the construction of the Science Teaching Laboratory Addition to Meier Hall and creation of additional simulation laboratories.

PLACE

Salem and the North Shore region of Massachusetts is a special place where the cultural, natural, and historical are intertwined with an entrepreneurial small business tradition. From the winding ocean fronts and rivers to the bustling seaports and mill towns, Essex County is distinctive. Salem State University's areas of academic excellence and civic connection promote the well-being and prosperity of the region and the Commonwealth. Founded as a Normal School to educate teachers in 1854, the university continues to lead in addressing the county's economic, educational, cultural, environmental, and workforce needs. Fostering the health and well-being of the region through education, healthcare, economic development, and social justice responds to the county's aging demographics and increasingly diverse population. Science and healthcare innovation, entrepreneurship, and workforce leadership advances economic growth. The university's academic expertise and research in the areas of coastal environment, cultural heritage, tourism, and arts and leisure safeguard local and regional resources. And, the Enterprise Center and the Small Business Development Center (SBDC) provide the community with timely and relevant support for small and large businesses.

CIVIC RESPONSIBILITY

Salem State has a historic commitment to civic engagement and civic learning, which has gained significant momentum with the investment of professional leadership in the Center for Civic

Engagement in 2015. The university strives to be an exemplar for civic engagement and civic learning leadership statewide, regionally, and nationally. Already having achieved the national President’s Honor Roll for Civic Engagement, our center partners internally with faculty and staff and externally with regional partners to provide our students with the pedagogy and experiential learning opportunities to become engaged members of their communities, the nation, and the world.

VISION-SUPPORTING OVERARCHING GOALS AND KEY STRATEGIES

The strategic positions and the university’s goals as reflected visually in Figure A. Financial Vitality and Sustainability, and Collaboration, Inclusion & Stewardship are foundational to achieving Academic Excellence and Student Success. The university has used the January 2016 NEASC Fifth-Year Interim Report^v as a guide and has aligned the duration of the plan to our decennial NEASC report in 2021.



GOAL: Financial Vitality and Sustainability - Strengthen Salem State’s financial foundation, align resources with priorities, and foster innovation to drive new revenue streams. Identify and implement additional opportunities to contain, reduce, or avoid future growth in costs.

Financial Vitality and Sustainability Strategies:

- Develop and implement a strategic enrollment plan based on information from three major initiatives undertaken in 2017: a marketability analysis, a financial leveraging study, and internal business intelligence work^{vi} that leverages program strengths, capitalizes on identified growth markets, and increases net tuition revenues. Specific programs that the

university will target for implementation are a B.S. in criminal justice administration, a B.S. in exercise science, a B.S. in healthcare studies, a B.S. in information technology, and the university will also pursue additional graduate degrees in nursing administration (M.S.), social work (D.S.W.) and occupational therapy (D.O.T.). In the context of the strategic enrollment plan, the university will expand alternative modes of course delivery in academic areas for which such innovations (e.g., online, hybrid, cohort-based, low-residency) are programmatically sound and fiscally prudent.

- Increase and diversify sources of non-tuition revenue to support ongoing operations and enable investment in strategic priorities, including expanded financial aid for students. Specifically, the university will increase summer conference revenue for the campus' residence halls and meeting spaces; evaluate further public-private opportunities such as leveraging the unique facilities to generate revenue streams via the university's Cat Cove Marine Center (such as the long-line blue mussel farm partnership with Legal Sea Foods) and the Enterprise Center's professional education programming. Increase applications and awards for external public and private grants.
- Increase the Salem State University Foundation's endowment by broadening our campus-wide culture of philanthropy and deepening engagement with Salem State alumni and the wider community.
- Perform ongoing and systematic analyses of academic programs to assess the relationship between required resources and (i) student demand/enrollment trends, (ii) workforce needs, and (iii) contribution to institutional mission; reallocate resources as appropriate to optimize student access to high-demand programs and sustain academic excellence.

GOAL: Collaboration, Inclusion, and Stewardship - Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship.

Collaboration, Inclusion, and Stewardship Strategies

- Establish Salem State as an institution embodying Inclusive Excellence that provides a culture of inclusion and belonging that fortifies SSU's reputation as a welcoming and diverse university committed to inclusion and equity.
- Intensify the culture of assessment and promote data-driven decision making in all aspects of the university's operations.
- Celebrate and showcase the accomplishments of faculty, staff, students, alumni, and the university itself; equip and engage members of the SSU community to be effective advocates and ambassadors in the wider community; and generate a stronger sense of pride and connection to place for all members of the campus community.
- Advance a leadership culture on campus that promotes shared responsibility and accountability for upholding Salem State's core values and behavioral norms.

GOAL: Academic Excellence - Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society.

Academic Excellence Strategies:

- Building on Salem State’s strength as a thought leader in the traditional arts and sciences (including the humanities, science and healthcare disciplines, the visual performing arts), health and human services (e.g., education, social work, nursing, occupational therapy, criminal justice), and business education, expand program enrollments that align with workforce needs through new program development, alternative mode of offerings including on-line, alternative scheduling options, and credentialing.
- Strategically align graduate programs with Salem State’s programmatic strengths, regional trends, and evolving entry-level degree requirements in the health and human services sectors to expand the enrollments to meet the regional workforce needs. This will be achieved, in part, by raising the visibility of these offerings.
- Leverage and seek to expand the contributions Salem State makes as a catalyst for economic growth and bring the university’s intellectual capital to bear on local issues to expand opportunities for students to have internships and other experiential opportunities that lead to increased post-graduation work placements.
- Provide up-to-date and environmentally friendly facilities and infrastructure, including information technology that meets evolving needs, advances teaching and learning, and attracts high-quality faculty, staff, and students to Salem State. Implement the next phase of the university’s Master Vision^{vii} including design and construction of the Science Teaching Laboratory Addition and for the next stage of the North Campus Precinct Study.
- Expand public awareness of Salem State’s academic strengths and institutional distinctions, and draw particular attention to the achievements and contributions of the university’s faculty, staff, students, and graduates. Champion SSU’s distinctive programs, academic pillars of excellence, and unique location as compelling differentiators in a competitive higher education landscape.
- Expand opportunities for civic learning and civic engagement through the implementation of active learning pedagogies

GOAL: Student Success - Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals.

Student Success Strategies

- Increase high school student participation in college through early college, dual enrollment, and pipeline programs (e.g., Upward Bound) targeted at communities with lower college attendance rates.
- Reinvent academic advising to provide comprehensive support for students including multi-year scheduling, curriculum/career maps, refined course offerings, and professional advisors to guide the first two years of study.
- Ensure student success by expanding high-impact programs (student research, study-abroad, internships, cohorts etc.) that prepare students for their future careers.
- Provide a student-centric culture of inclusion and belonging, fortifying SSU’s reputation as a welcoming and diverse university.
- Ensure students acquire necessary knowledge, skills, experiences, and sensitivity to be informed and engaged citizens who value diversity and champion social justice, civic responsibility, and Inclusive Excellence to promote a spirit of service and heightened sense of mutual responsibility among members of the campus community.
- Increase public awareness of the intrinsic value to students and the economy of coupling liberal arts majors with professional preparation programs.

BUSINESS PLANS

The Salem State University comprehensive strategic plan is supported by nine integrated component business plans. Each of these components impact the priorities and resourcing of the strategic plan. As cross-divisional planning groups review data and projections, the feasibility and availability of resources to support multiple priorities will be evaluated, and opportunities for consolidation and collaboration identified. This will strengthen the implementation of the strategic plan by assuring that the strategies are integrated, focused, and supportable.

Academic Affairs:

Salem State University will be widely known as the state university that confers affordable, high-quality degree for all students, with a focus on educating members of historically underrepresented communities. The university will also become a “first choice” institution of higher education for residents of the North Shore, widely known for an effective approach to fostering academic success for students of diverse backgrounds at various stages of their personal and professional careers. While maintaining its long-standing commitment to a strong educational core in the liberal arts, over the next four years, Salem State will emphasize growth in those disciplines that meet the current and projected needs of the region, including those requiring preparation in the sciences and healthcare. Undergirding the academic experience of every Salem State student will be commitments to the value of diversity, inclusion, and collaboration to foster a socially just and civically engaged society.

Capital Planning:

The success of the university and its strategic plan depends on providing the physical resources necessary for our students to succeed. Capital Planning (CP) supports the plan by working with all

areas of the institution to maintain, improve, and construct the physical resources that will advance the goals of the university. It will be guided by the Salem State University Master Vision 2040 (2013) and the North Campus Precinct Study (2017).

Community Outreach: The success of the university and its strategic plan depends on communication and collaboration both internally and externally. External Affairs (EA) and Public Relations (PR) support the plan by working with all areas of the institution and its external partners to promote the strategic concepts while making connections that will advance the goals of the university. This involves strong communication and transparency both within and outside the university. A key factor to the community outreach work that will benefit all five priorities of the strategic plan is enhancing the reputation of the university. This effort will increase our opportunities with external partners while also providing a sense of pride, place, and inclusivity within the institution. This work should focus around the key areas of the strategic plan and allow for all members of the internal community to be aware of, and have a voice in, campus priorities and happenings.

Enrollment Management/Marketing:

Salem State’s strategic enrollment plan will rely on information from three major initiatives. The marketability analysis (performed by industry leader, Stamats) will determine which of our current (or possibly new) programs have room to grow from an external market perspective. This work is largely complete and has identified a handful of undergraduate and graduate programs that have significant growth opportunity. A financial aid leveraging study (performed by industry leader Ruffalo Noel Levitz) will assist with decisions on how to best use our institutional aid to drive key institutional priorities, like enrollment growth and increased net tuition revenue. And, the university’s internal business intelligence work to help us identify “profit margin.” These three key initiatives will help to shape our enrollment strategy for the future, and allow us to move forward in a data-informed way.

Finance and Business:

The Finance and Business plan will continue to expand capabilities to improve the financial management of the university. This includes providing data and systems to support decision making and performing analyses to support strategic choices about investment or disinvestment in academic programs, capital assets and administrative activities. This business plan will generate additional revenue from underutilized assets.

Human Resources/Inclusive Excellence:

The Human Resources (HR) will advance the University’s strategic plan by providing superior service, support and opportunities critical to fostering a talented, diverse and engaged workforce. In partnering with Inclusive Excellence, HR views itself as an organizational leader in delivering employee excellence; recommending, supporting, and implementing personnel policies and procedures; providing employee development opportunities; and in partnering with key University

constituents and stakeholders to attract and retain an exceptional, diverse workforce. In collaboration with ITS and Finance and Business, HR strives to help senior management produce data driven decisions by seeking appropriate systems and infrastructure to support the employee environment as it relates to student success.

Information Technology:

Information Technology Services' (ITS) focus will be in three strategic areas. First, developing a campus-wide strategy and implementation of business intelligence to support data driven decision making by departments and senior leadership. Second, ITS will continue to support the creation of new programs by working with the deans and enrollment management to ensure systems and infrastructure are able to support such programs. And, third, ITS has embraced an Inclusive Excellence culture in three different areas; the classroom, the public facing website, and the academic computing environment, and will continue to expand these capabilities.

Institutional advancement:

Institutional Advancement (IA) seeks to foster inclusive relationship-building with our alumni, students, and friends, and involve our campus and community partners in the diverse community life of our university. IA will promote investment in the strategic priorities of Salem State University, such as the science teaching laboratories and scholarships to assist in eliminating financial barriers for students. We will connect donor passion with strategic plan priorities as well as engage alumni with our campus as resources for speakers, volunteers, mentors, and employer relation opportunities.

Student life:

Student life has recently reorganized to address the needs of Salem State students. The reorganization includes a cluster model, which brings together the eight student life departments to address three major themes: wellness, engagement and student experience/transition. To deepen the effectiveness of this model, our work will be approached with an emphasis on reducing redundancies and maximizing resources (human and financial capital); focusing on reaching depth of high impact practices for our students and systematizing practices so all students have the opportunity for personal development and learning. Specifically, student life will focus on increased student development and preparedness for a life of learning and personal success; greater retention and persistence of all students, with a focus on the “murky middle” and traditionally marginalized students; and higher student satisfaction in areas of living and learning.

METRICS

The following table presents the university-wide metrics for Salem State University’s strategic plan. The executive director of strategic planning and decision support is tasked with leading and supporting the campus with development of specific metrics for each strategy. The Collaboration Committee will provide oversight of reporting.

Key Metrics	Baseline FY2017	Goal FY2021
Financial Vitality & Sustainability:		
Total Enrollment (Fall 2016)	9,001	TBD
Endowment	\$28.5M	TBD
Operating Cash Flow Margin	2.16%	TBD
Gift Revenue to University	\$1,800,982	TBD
College Completion		
Six-year Graduation Rate All Students*	52%	62%^
Closing Achievement Gaps		
Six-year Graduation Rate Black - White*	-1.48	0.00^
Six-year Graduation Rate Hispanic - White*	-8.68	0.000^
Six- year Graduation Rate Male-Female*	-5.62	0.000^
Six-year Graduation Rate Pell-Eligible vs. Non-Pell-Eligible	-10.85	TBD
% Faculty of Color	19%	TBD
% Staff of Color	18%	TBD
Achieve Hispanic Serving Institution Status		TBD
Civic Engagement		
Achieve Carnegie Classification for Civic Engagement		2020
Workforce Development		
Open Science Teaching Lab Addition	Study Completed	TBD

*BHE Big 3

^Existing Commitments to BHE

ⁱ “Campus Climate” (also called the “college environment”) is defined as “the current attitudes, behaviors, standards, and practices of employees and students of an institution.” Positive personal experiences with the college environment and positive perceptions of the college environment generally equate to successful outcomes. These successful outcomes include: positive educational experiences and healthy identity development for students,

productivity and sense of value for faculty and staff, and overall well-being for all. The college environment is shaped through personal experiences, general perceptions and institutional efforts. The campus climate study is multi-stage process that allows us to measure people’s personal experiences and perceptions so that we can more thoughtfully address challenges and plan strategic initiatives to enhance the college environment. An external consultant, Rankin & Associates, was hired to work with our community to develop a survey to administer to the entire Salem State community, to analyze and present the results of that survey and to establish a community implementation team to oversee the use of the data and ensure that concrete actions follow from the results of the survey.

ii http://nerche.org/index.php?option=com_content&view=article&id=341&Itemid=618

iii Salem State University has aligned its strategic plan with its decennial New England Association of Schools & Colleges (NEASC) accreditation report in 2021. https://records.salemstate.edu/sites/records/files/reports/2017-04/NEASC_Report_for_Salem_State_University_01.19.2016.pdf

iv <https://www.salemstate.edu/offices-and-services/facilities/capital-planning-and-facilities-management>

v https://records.salemstate.edu/sites/records/files/reports/201704/NEASC_Report_for_Salem_State_University_01.19.2016.pdf

vi Salem State’s strategic enrollment plan will rely on information from three major initiatives:

1. Marketability Analysis (performed by industry leader, Stamats) – to help us determine which of our current (or possibly new) programs have room to grow from an external market perspective. This work is largely complete and has identified a handful of undergraduate and graduate programs that have significant growth opportunity
2. Financial Aid Leveraging study (performed by industry leader, Ruffalo Noel Levitz) – to help us determine how to best use our institutional aid to drive key institutional priorities, like enrollment growth and increased net tuition revenue. This work will be complete by the end of December.
3. Internal business intelligence work – to help us determine program “profit margin”

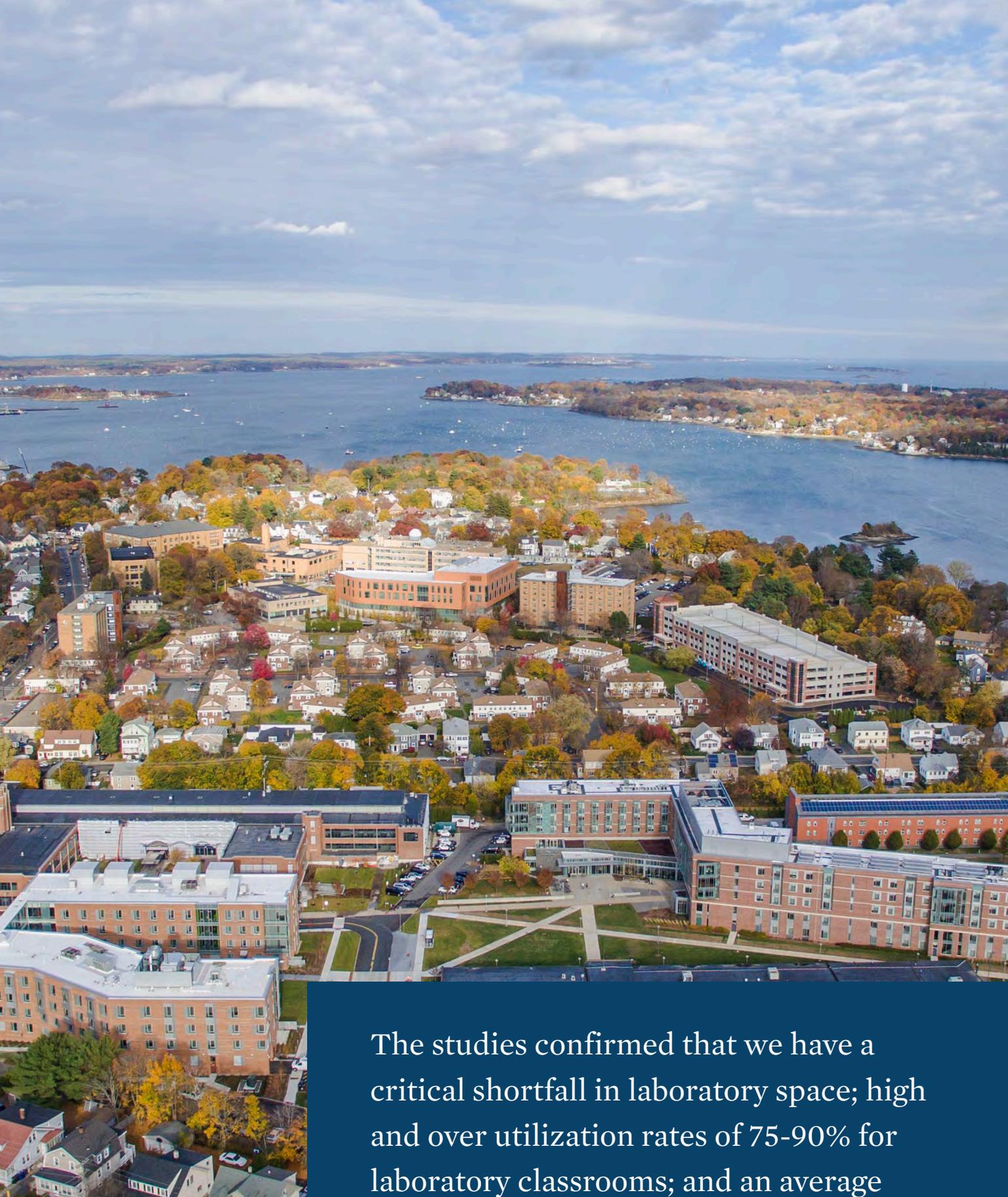
These three key initiatives will help to shape our enrollment strategy for the future, and allow us to move forward in a data-informed way.

vii See Note iii above.

Science Teaching Laboratory Addition

Salem State University

December 2017



The studies confirmed that we have a critical shortfall in laboratory space; high and over utilization rates of 75-90% for laboratory classrooms; and an average enrollment in lab courses of 100%, which results in filling every lab offered.



Science Teaching Laboratory Addition

Why this project?

DCAMM studies in 2007 and 2013 established that Salem State University's current science laboratories, located in Meier Hall, are insufficient and unsuitable for renovation to 21st century laboratory standards.

The studies confirmed that Salem State University (SSU) has a critical shortfall in laboratory space; high and over utilization rates of 75-90% for laboratory classrooms; and an average enrollment in lab courses of 100%, which results in filling every lab offered. SSU leads the state university system in biological and biomedical sciences; physical sciences; and health professions and related programs, enrolling 26.5% of all courses in these areas. Although SSU is a system leader in the education and development of scientists, nurses, occupational therapists and health science professionals on the North Shore and throughout Massachusetts, insufficient and outdated laboratory space limits our ability to meet workforce needs regionally and throughout the Commonwealth. In response to these findings, SSU requests funding for a science teaching laboratory addition (STLA) to Meier Hall (MH).

Our labs are used for a broad range of coursework for science majors, as well as, support courses for health disciplines and general education requirements. SSU's strategic plan, which was recently approved by the Board of Higher Education, recognizes the importance of enrollment growth in these areas to the



Commonwealth's workforce and confirmed that STLA will meet student and industry demand for science and healthcare degrees and credentials. Our current laboratory capacity is inadequate to meet both these demands and our pedagogy. STLA will provide much needed and modernized space for biology, chemistry and geology majors; will allow for greater flexibility in course scheduling, student and faculty research, and alternative delivery methods; and will free up space in MH to better serve general education and support courses.

STLA is a top priority of the university's 2013 Campus Master Vision plan. High-quality laboratory space was identified as key driver for programmatic growth, which is limited by our existing facilities. Current structural conditions prohibit the modernization of existing labs and the installation of state-of-the-art equipment to train our students. STLA's 20 teaching and research labs would not only allow for the upgrades necessary to educate our students in 21st century laboratories and to address lab safety upgrades, but would also enable the repurposing of existing laboratories in MH into dry labs, classrooms and offices, supporting the ultimate goal consolidating our academic functions on South Campus to North and Central Campuses.

STLA will support the growing and high demand workforce needs in biotechnology, bioscience, pharmaceutical, nursing and allied health industries that are strengths of the North Shore.

SSU academic programming is well aligned with the workforce needs of the region and is a major provider of science and healthcare BS/BA+ degrees for the North Shore and beyond. A recent study by the North Shore Workforce Investment Board has documented the increasing need for these employees as the incumbent regional workforce reaches and passes retirement age. STLA will support the growing and high-demand workforce needs in biotechnology, bioscience, pharmaceutical, nursing and allied health industries that are strengths of the North Shore.

STLA also aligns with the Commonwealth's priorities by replacing unsuitable facilities with modern scientific teaching spaces, which will allow for the expansion of scientific and healthcare disciplines. The project supports Massachusetts' goals of ensuring it remains a global leader in life sciences by investing in human

As the only state university without 21st century laboratories, SSU will become significantly challenged to meet its mission for both our students and the region we serve without STLA.

capital and workforce development, and preparing our graduates for careers in these fields in up-to-date facilities. Construction of a laboratory-only addition will bring our infrastructure in line with the functionality and instrumentation of the region's STEM and healthcare industries and will expand our ability to deepen programmatic collaborations with regional education, non-profit and industry partners. Regional partners provide some exposure to modern infrastructure via internships and part-time employment, but this is not enough to fully prepare our graduates for their future occupations.

Additionally, STLA supports the DHE Big 3 goals of college participation, college completion and closing achievement gaps. Although SSU graduation rates have increased, retention has improved, and SSU has been a system leader in closing achievement gaps over the past 10 years, our laboratory limitations restrict growth in some STEM areas. For example, SSU has capped admissions to biology and nursing programs due to the lack of adequate laboratory space. As the most diverse of the state universities, our changing demographic compounds the need to improve our lab spaces so that we can continue to close the achievement gap in these important fields.

Despite outdated and unsuitable laboratory infrastructure, our talented faculty educate majors in the STEM and health sciences fields as well as all students with complementary coursework valued by industry in business, liberal arts and education. Our alumni are valuable assets to the North Shore region and beyond. With the demographic shifts and the growing occupational opportunities of the North Shore, we need to make sure our graduates are prepared with the most up-to-date facilities available. As the only state university without 21st century laboratories, SSU will become significantly challenged to meet its mission for both our students and the region we serve without STLA.



Campus Master Plan

STLA Alignment with Campus Master vision

Completed in July 2013, the Salem State University (SSU) Campus Master Vision establishes a plan for the institution's presence in the greater North Shore region—a plan rooted in the academic mission of the university and one that advances its role in community and economic development. The Campus Master Vision builds on and extends the ideas originally communicated in the 2007 Campus Master Plan. The Science Teaching Laboratory Addition (STLA) has been a consistently documented need in each of the planning studies, and was the subject of a follow-up, more detailed feasibility study completed in 2014.

Four key principles govern the 2013 plan: flexibility, connectivity, identity, and community. These principles reflect the university's aspirations to establish a compact and efficient campus core that maximizes programmatic synergies and consolidates Salem State's footprint within its Central and North Campuses. In so doing, SSU divests of much of its South Campus facilities and, accordingly, reduces overall deferred maintenance liability.

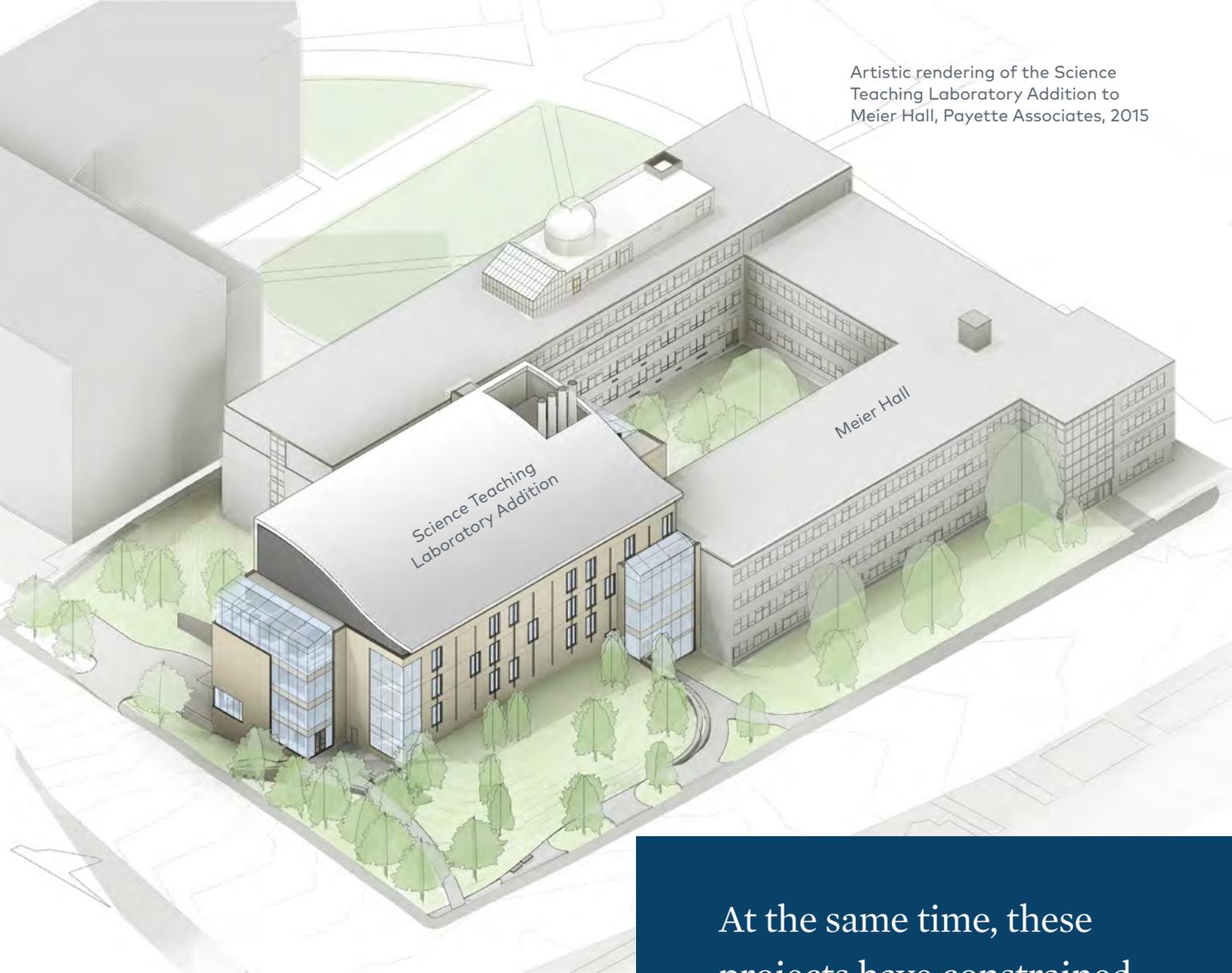
Since completion of the 2007 and 2013 planning efforts, SSU has successfully completed numerous projects to improve both the academic and student experience while addressing deferred maintenance issues within ageing buildings and infrastructure. Some of these projects were completed in partnership with DCAMM, including full state funding for the Frederick E. Berry Library and Learning Commons and partial state funding (roughly 27.5%) for Sophia Gordon Center for the Creative and Performing Arts Center renovation. Other projects were completed in collaboration with MSCBA, which issued bonds that are repaid by student fees, including the Harold E. and Marilyn J. Gassett Fitness Center, Viking and Marsh Residence Halls, and the North Campus Parking Garage.

These principles reflect the university's aspirations to establish a compact and efficient campus core that maximizes programmatic synergies and consolidates Salem State's footprint within its Central and North Campuses.

Salem State University has also funded various leases and fit-outs to accommodate administrative needs (preserving core campus buildings for academic functions) with operating funds. All of these projects demonstrate a strong commitment to implementing the Campus Master Vision, and exhibit the university's willingness to contribute our own funds toward making the Vision a reality. At the same time, these projects have constrained our capacity to fund and implement a critical project of the size and scale of STLA.

STLA remains the highest priority project for the university, and closely aligns with our academic plan and the needs of the Commonwealth's workforce. The current science facilities in Meier Hall (MH) limit our ability to meet the demand of STEM courses both for science majors and for health disciplines as well as general education requirements. The 2013 Master Vision plan documents the hyper-utilization of MH labs, both from a seat fill rate (often 100%) and room use rate (75-90%), well in excess of Massachusetts' space standards.

The STLA project is not only a high priority in terms of academic need, but is also the highest priority deferred maintenance project for SSU. Various studies have concluded that Meier Hall is not suitable for wet laboratory uses due to low ceiling heights and mechanical system limitations—the key factors that led to the conception of STLA. Meier Hall, however, does offer important programmatic space (dry lab, classroom, and office) to allow the university to



subsequently address deferred maintenance issues in many other of its buildings, including Sullivan Hall, the Horace Mann Building, Ellison Campus Center, the Dining Commons, and divestment of 92,000 gross square feet of South Campus facilities, much of which are in poor condition.

In this way, STLA becomes the critical domino for reducing the university's deferred maintenance liability while also realizing its academic mission. Similar to the Frederick E. Berry Library and Learning Commons Project, capital investment by the Commonwealth in the Science Teaching Laboratory Addition, will position SSU to address other deferred maintenance projects in smaller increments.

At the same time, these projects have constrained our capacity to fund and implement a critical project of the size and scale of STLA.



The divestment of South Campus represents a significant opportunity for SSU and the Commonwealth. Many buildings on South Campus are in poor physical condition with a total of \$42.5M in deferred maintenance. The isolation of this area also complicates class scheduling, transportation and parking. Investing \$42.5M in deferred maintenance in this property would only keep it operational in its current capacity and would not account for

renovations that would bring a former parochial school to an expanded, modern nursing laboratory building. Rather than invest that money to maintain inadequate space, the university would like the Commonwealth to divest from this campus and invest in STLA. STLA would be a purposely-built facility that would meet our current academic demands and industry standards, as recommended by DCAMM studies in 2007, 2013 and 2015 and Sightlines 2017.

#	Building Name	Primary Use	Campus	Funding Source
1	Harold E. and Marilyn J. Gassett Fitness Center	Academic and Student Services	O'Keefe Athletic Complex	Debt Funded Project and Private Donation*
2	North of Loring Parking Lot (Weir/Stanley property)	Parking	Central Campus	Debt Funded Project
3	Stanley Building	Academic and Administrative	Central Campus	Federal Grant
4	Viking Residence Hall	Student Services	Central Campus	Debt Funded Project
5	Renovation of Student Navigation Center	Student Services	Central Campus	Debt Funded Project
6	Renovation of university police department	Administrative	Central Campus	Debt Funded Project
7	Marsh Residence Hall	Student Services	Central Campus	Debt Funded Project
8	331 Lafayette Street Lease: Administrative Offices	Administrative	Other	Operating Budget
9	Renovation of Administration Building	Academic and Administrative	North Campus	Operating Budget
10	Sophia Gordon Center for the Creative and Performing Arts	Academic	North Campus	Debt Funded, Operating Budget, Private Donation, and DCAMM (27.5%)
11	Frederick E. Berry Library and Learning Commons	Academic and Student Services	North Campus	DCAMM
12	Parking Garage	Parking	North Campus	Debt Funded Project
Off Map	287 Lafayette Street Lease: School of Social Work	Academic	Other	Operating Budget

- Recent projects, leases, or acquired property
- Science Teaching Laboratory Addition
- Deferred maintenance to be addressed through renovations and South Campus program consolidation
- South Campus divestment

*Debt Funded Project: Project funded by MSCBA issued bonds that are repaid by student fees



Institutional Profile

About Salem State

Salem State's 163-year history reflects the growth of its mission and its vital role in the nation, the Commonwealth and the local community. From its beginnings as a teaching college to the large, diverse and comprehensive academic institution it is today, the university has remained true to the value of its founders, and continually seeks a forward path, adapting to society's changing needs while ensuring the intellectual and material well-being of the North Shore region of Massachusetts and beyond.

Located just 15 miles north of Boston, Salem State is one of the largest and most diverse state universities in the Commonwealth of Massachusetts and is an important partner in the economic, cultural and intellectual vitality of the greater north-of-Boston region. Situated in the historic seacoast city of Salem, Massachusetts on more than 115 acres and





five campuses, Salem State provides a diverse community of over 9,000 students, a high quality, student-centered education; one that prepares them to contribute responsibly and creatively to a global society and to serve as a resource to advance the region's cultural, social and economic development.

The university supports a full-time faculty of over 350 and offers 32 undergraduate degree programs in the liberal arts and sciences, health and human services, education, and business, along with graduate programs that offer degrees in 24 fields such as education, science, humanities, business, criminal justice, and nursing, among others. The university also has a continuing education division that offers both credit and non-credit programs.

Salem State's faculty represent a wide variety of academic institutions including the most prestigious in the country and the world. The university has been

recognized twice in the past five years as being among the top producing institutions of Fulbright Scholars. Faculty hold a deep commitment to teaching and learning and pride themselves on connecting with students at an individual level. Student learning opportunities are personal and collaborative, yet large enough to broaden students' understanding of their world.

The university's students hail from 28 states and 63 countries. The university is proud that 35 percent of its 2016 freshman class self-identified as being students of color. Salem State has over 65 student groups and clubs, 15 varsity teams along with intramural sports, and hundreds of student activities scheduled throughout the year. The university has a nationally award-winning residence life program. One-third of the undergraduate degree-seeking population, including two-thirds of the freshman class, lives on campus.



Located just 15 miles north of Boston, Salem State is one of the largest and most diverse state universities in the Commonwealth of Massachusetts and is an important partner in the economic, cultural and intellectual vitality of the greater north-of-Boston region.

Indicators of 21st Century Growth

	2006	2016	Change
Total Revenues	\$106.8M	\$164M	53%
Campus (number of buildings)	20	29	45%
Campus (total square feet)	1,152,221	2,046,328	78%
Degrees Awarded	1,434	2,214	54%
Graduation Rate*	37%	52%	+15%
Students of Color Enrollment	14.80%	29.40%	+15%
Hispanic/Latino Student Enrollment	4.80%	12.90%	+8%
Full-time Faculty	320	351**	10%
Resident Students (Housing Capacity)	1,404	2,282	63%
International Partnerships	3	25	733%
Community Service Hours	1,281	359,891	27995%

FTE Enrollment in Science and Healthcare Courses

Health Professions and Related Programs	350	548	57%
Physical Sciences	381	464	22%
Biology & Biomedical Sciences	330	489	48%



*Data is from 2007 and 2017 (projected)

**2015 IPEDS data

Points of Pride

Salem State University

As an institution, Salem State has made significant gains over the last ten years, and is poised to continue that trend through strategic investment in its people, its facilities, and the broader North Shore community. Specific achievements are highlighted here.

University Status—In 2010, Salem State College became Salem State University, a legislated change in status which reflected the large, comprehensive institution the university had become. University status brought greater recognition to the high quality of Salem State's academic programs and the many accomplishments of its faculty and students. With the university designation, Salem State expanded academic programming grounded in the expertise of its faculty and designed to address the changing needs of its community and workforce. Among many highlights, Salem State's School of Social Work was ranked #91 (of over 250 programs) by US News & World Report in 2016 and is the highest ranked public program in Massachusetts.

Increased Graduation Rates—Student success is Salem State's key goal. From 2007 to 2016, the graduation rate for baccalaureate students increased 15 percentage points—the largest change in the state university system. Salem State's six-year graduation rate for first-year freshmen increased from 37 percent in 2007 to 52 percent in 2016, with a graduation rate for transfer students at 67 percent. This growth reflects the exceptional efforts of faculty and staff to support students, and the university continues to set aggressive goals in the area of student success.

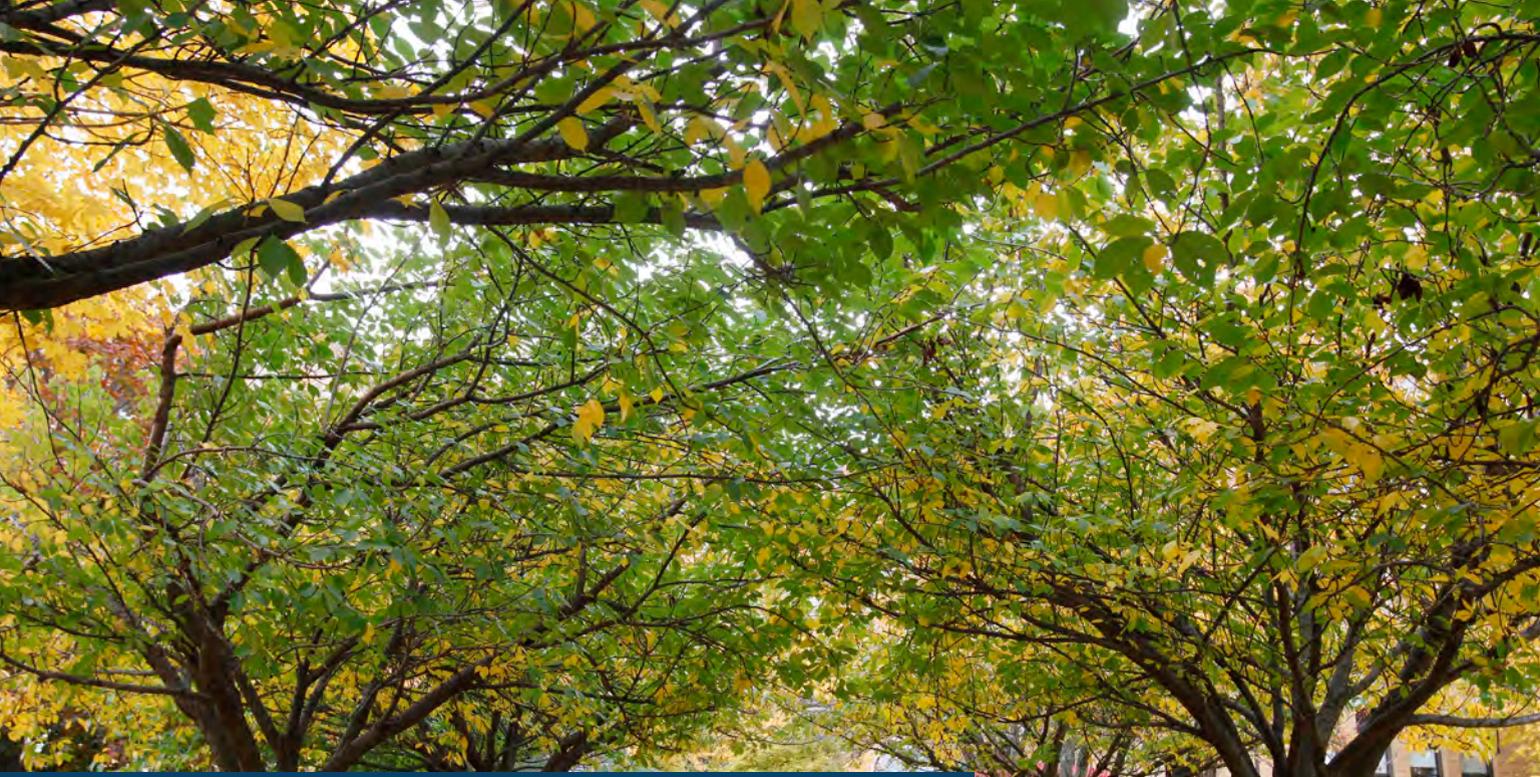
Diverse Community—Salem State University is the most diverse public university in the Commonwealth with over 29 percent of the student population from underrepresented backgrounds. In addition, over 35 percent of students identify as first generation college students. Salem State is known for its culture of

inclusion and, over the last five years, the university has expanded cultural and identity based programs and dialogues. Given population trends, the university is preparing to be a Hispanic Service Institution in future years.

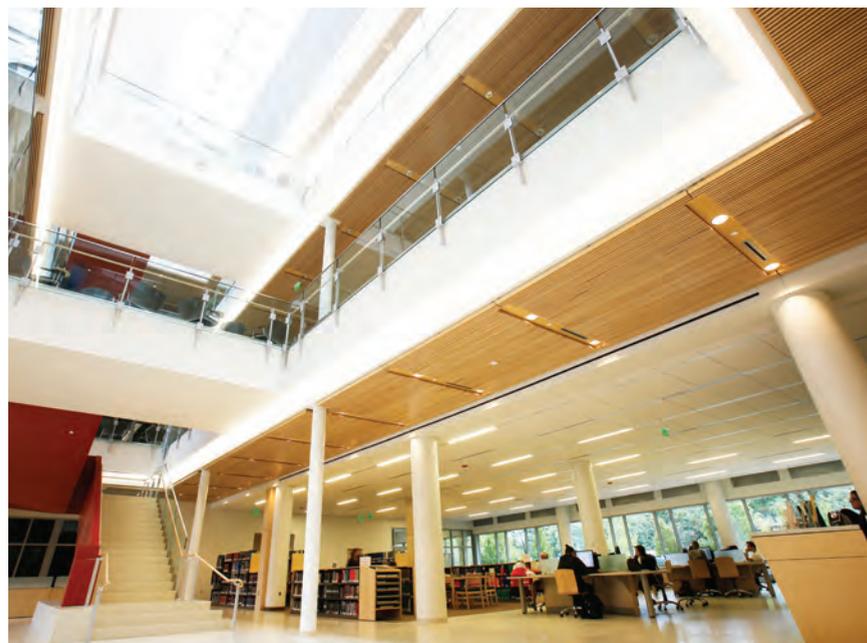
New State-of-the-Art Academic and Student Life Spaces—Changes to the physical campus over the past decade are profound. Nearly 760,000 square feet of new construction and renovations have been completed or are underway, bringing state-of-the-art academic and student life spaces to campus. Through the support of the Commonwealth of Massachusetts and generous donors, combined with resources of the university's operating budget, and issued debt to be repaid by student fees, over over \$250 million has been invested in campus improvements. Highlights of these changes include the Frederick E. Berry Library and Learning Commons, the Sophia Gordon Center for Creative and Performing Arts, the Harold E. and Marilyn J. Gassett Fitness Center, athletic fields and courts, and two residence halls that provide accommodations for nearly 900 students. Funding for a new Science Teaching Laboratory Addition is the top priority to meet the strong demand for science, healthcare and technology programming.

Residential Campus—In recent years, Salem State has shifted from a commuter campus to a more residential campus. Currently, one-third of the undergraduate degree-seeking population lives on campus, one-third lives in local neighborhoods, and the remaining third commutes from home. In addition to new residential facilities, Salem State has also added a new student life co-curriculum.

A Successful Comprehensive Fundraising Campaign that Raised Over \$26 Million—In December of 2016, Salem State announced the successful completion of the university's first comprehensive campaign. Exceeding its \$25 million goal, over \$26 million was raised during the campaign from more than 11,000 donors, with a remarkable 93 percent participation rate among faculty and staff. The funds resulted in the establishment of 48 new scholarships for students and much needed financial support for academic programs.



Changes to the physical campus over the past decade are profound... Funding for a new Science Teaching Laboratory Addition is the top priority to meet the strong demand for science, healthcare and technology programming.



Salem State University

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John David Keenan, JD

Presidential Review

2016-2017

Addendum

April 26, 2018

TABLE OF CONTENTS



Access/College Participation	2
Enrollment Rates	2
College Participation	3
Closing Achievement Gaps	5
College Completion/Student Success	10
Retention Rates	10
Graduation Rates	10
Healthcare & STEM	11

Access/College Participation

a. Enrollment Rates

Salem State has not been immune to the declining enrollment that has become a regional and national phenomenon. This decline can be explained by the decreasing numbers of high school graduates and the shifting demographics. In terms of our graduate program, we have witnessed a decline in our fall '17 headcount but a significant increase in credit hours during this same time (see Table I).

Table I: Fall and Annual Headcount and Credit Hours

Fall Headcount	Fall 2015	Fall 2016	Fall 2017
Fall Headcount Total	9,215	9,001	8,702
Undergraduate Headcount	7,499	7,346	7,110
Graduate Headcount	1,716	1,655	1,592
Fall Credit Hours	Fall 2015	Fall 2016	Fall 2017
Fall Credit Hours Total	106,608.0	105,702.5	103,879.5
Undergraduate Credit Hours	95,900.0	94,878.5	92,537.5
Graduate Credit Hours	10,708.0	10,824.0	11,342.0
Annual Unduplicated Headcount	FY 2015	FY 2016	FY 2017
Annual Headcount Total	11,633	11,497	11,057
Undergraduate Headcount	9,248	9,084	8,823
Graduate Headcount	2,338	2,342	2,166
Both Undergraduate & Graduate	47	71	68
Annual Credit Hours	FY 2015	FY 2016	FY 2017
Annual Credit Hours Total	229,879.5	228,130.5	225,245.0

Undergraduate Credit Hours	202,651.5	200,192.5	197,400.0
Graduate Credit Hours	27,228.0	27,938.0	27,845.0
Annual FTE	FY 2015	FY 2016	FY 2017
Annual FTE Total	7,889.2	7,835.0	7,738.3
Undergraduate FTE	6,737.1	6,649.6	6,560.8
Graduate FTE	1,112.8	1,123.8	1,114.4
Both Undergraduate & Graduate FTE	39.3	61.6	63.2

b. College Participation

Salem State continues to have the highest percentage of undergraduate students of color, combined, and also Latinx students, separately, for all of the Massachusetts State Universities. We share the top rank for African American students with Bridgewater State University (see Table II).

Table II: Total Enrollment by Race/Ethnicity

	2015	2016	2017
Salem			
White	75%	74%	71%
Latinx	11%	12%	14%
African American	8%	8%	9%
Other Known Race/Ethnicity	6%	6%	6%
Bridgewater			
White	81%	80%	79%
Latinx	6%	6%	6%
African American	8%	9%	9%
Other Known Race/Ethnicity	5%	5%	6%
Fitchburg			
White	86%	85%	84%
Latinx	6%	6%	7%
African American	4%	5%	5%

Other Known Race/Ethnicity	4%	4%	4%
Framingham			
White	81%	79%	76%
Latinx	8%	9%	10%
African American	5%	5%	7%
Other Known Race/Ethnicity	6%	7%	7%
Mass Maritime			
White	90%	89%	90%
Latinx	3%	4%	4%
African American	3%	2%	1%
Other Known Race/Ethnicity	4%	5%	5%
Mass Art			
White	76%	73%	72%
Latinx	10%	12%	12%
African American	4%	4%	5%
Other Known Race/Ethnicity	10%	11%	11%
MCLA			
White	81%	80%	81%
Latinx	6%	7%	6%
African American	8%	8%	8%
Other Known Race/Ethnicity	5%	5%	5%
Westfield			
White	81%	80%	79%
Latinx	9%	9%	10%
African American	5%	5%	5%
Other Known Race/Ethnicity	5%	6%	6%
Worcester			
White	80%	80%	79%
Latinx	7%	8%	8%
African American	7%	6%	6%
Other Known Race/Ethnicity	6%	6%	7%

In terms of the gender gap, the national trend continues. That is, the percentage of males enrolling in higher education continues to decline. Where for the last two years we held steady at 36%, FY 17 saw a 1% decrease (see Table III).

Table III: Gender distribution by percentage, Male

	2015	2016	2017
Salem	36%	36%	35%
Bridgewater	39%	39%	39%
Fitchburg	31%	30%	30%
Framingham	29%	30%	31%
Mass Maritime	86%	85%	85%
Mass Art	31%	29%	30%
MCLA	36%	35%	35%
Westfield	42%	37%	43%
Worcester	33%	34%	33%

Closing Achievement Gaps

We were extremely proud to be recognized by The Education Trust as one of the top ten institutions closing the achievement gap for Latinx students. We have set an ambitious goal of eliminating the achievement gaps (black-white, Hispanic-white, male-female) for six-year graduation rates over the next four years (see Graph I).

Trends: Closing Latino/a vs. White Gaps in Graduation Rates

Is progress being made in reducing gaps between Latino/a vs. White students in graduation rates, or are they worsening over time?

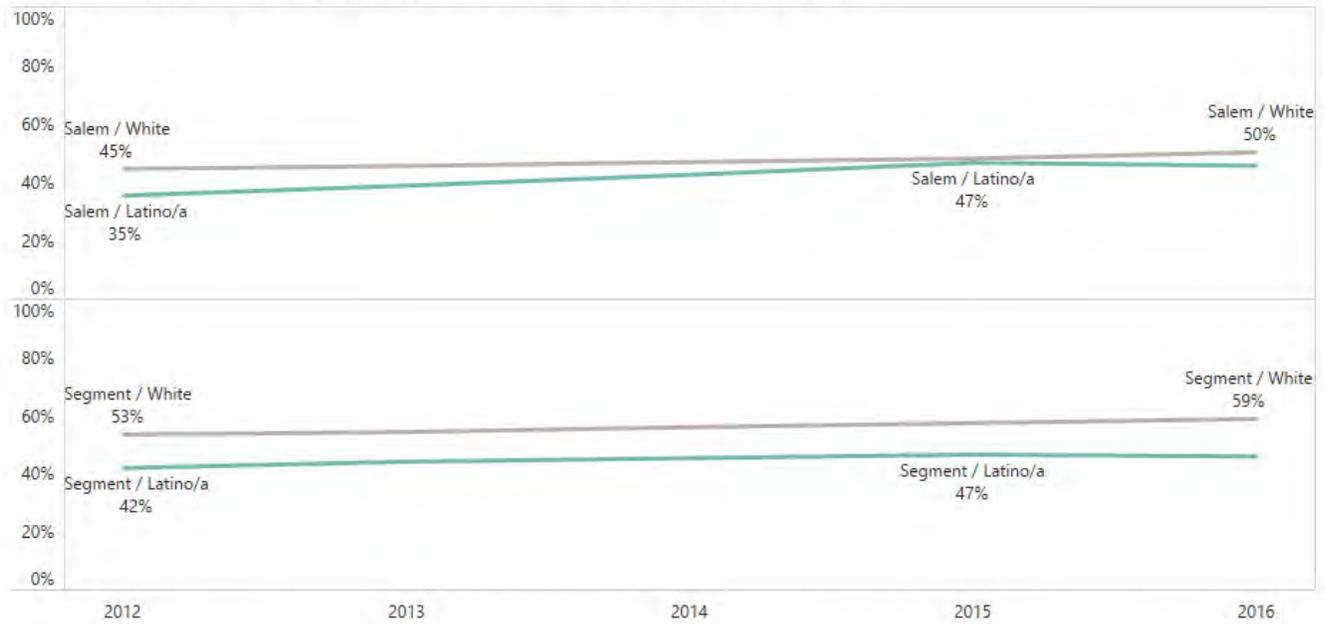
Choose Another Institution for Comparison:

Salem

Choose Another Comparison Set:

Latino/a vs. White

State Universities: Gaps in Six-Year Graduation Rate (2012 to 2016)



Graph I

The achievement gap by gender continued its increase. To that end, we are being intentional in addressing this ongoing issue as evidenced by the Men of Color Learning Community (referenced earlier in the report) and its 100% retention rate (see Graphs II and III).

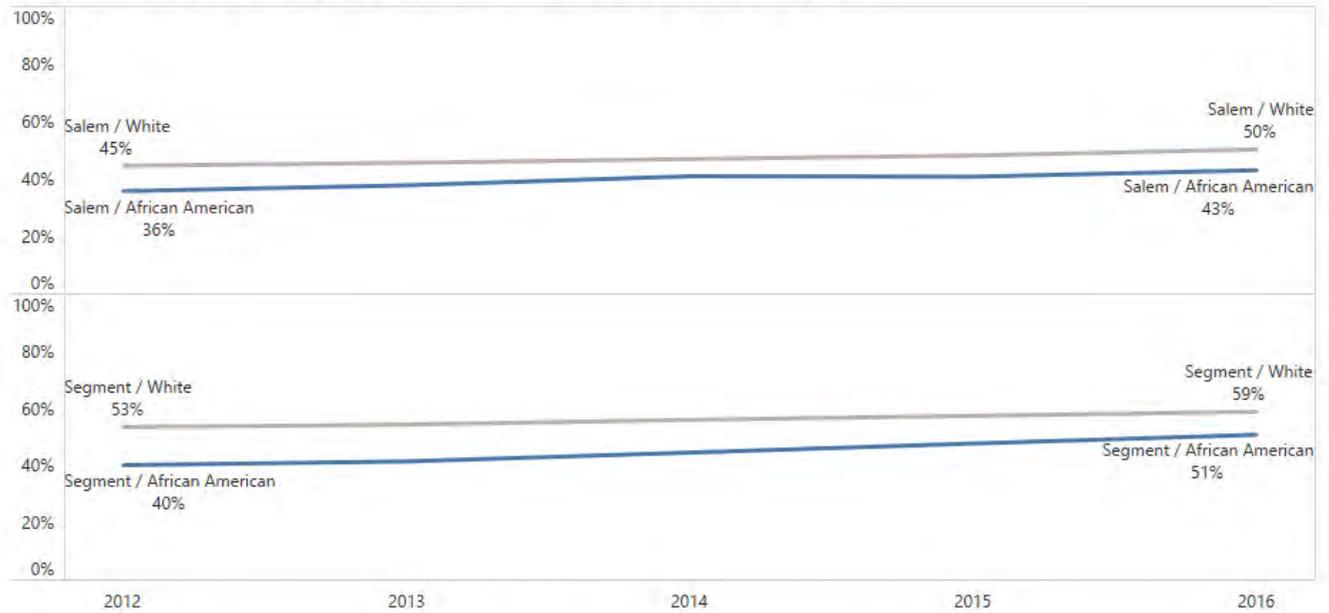
Trends: Closing African American vs. White Gaps in Graduation Rates

Is progress being made in reducing gaps between African American vs. White students in graduation rates, or are they worsening over time?

Choose Another Institution for Comparison:
Salem

Choose Another Comparison Set:
African American vs. White

State Universities: Gaps in Six-Year Graduation Rate (2012 to 2016)



Graph II

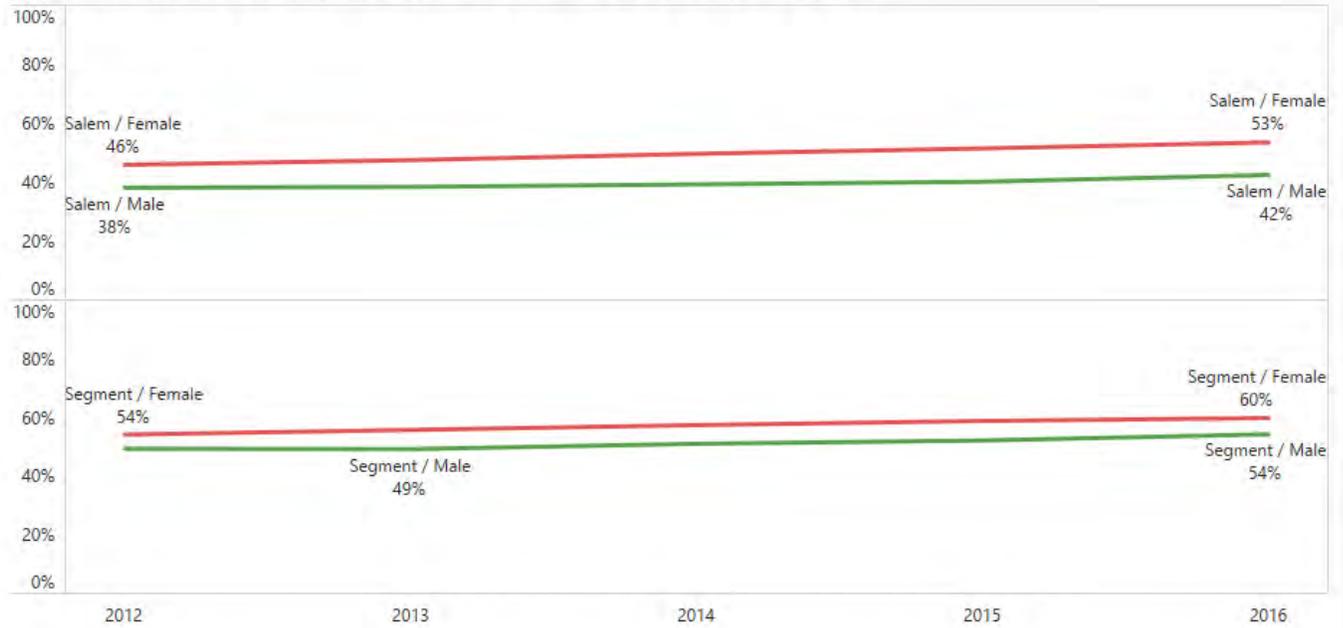
Trends: Closing Male vs. Female Gaps in Graduation Rates

Is progress being made in reducing gaps between Male vs. Female students in graduation rates, or are they worsening over time?

Choose Another Institution for Comparison:
Salem

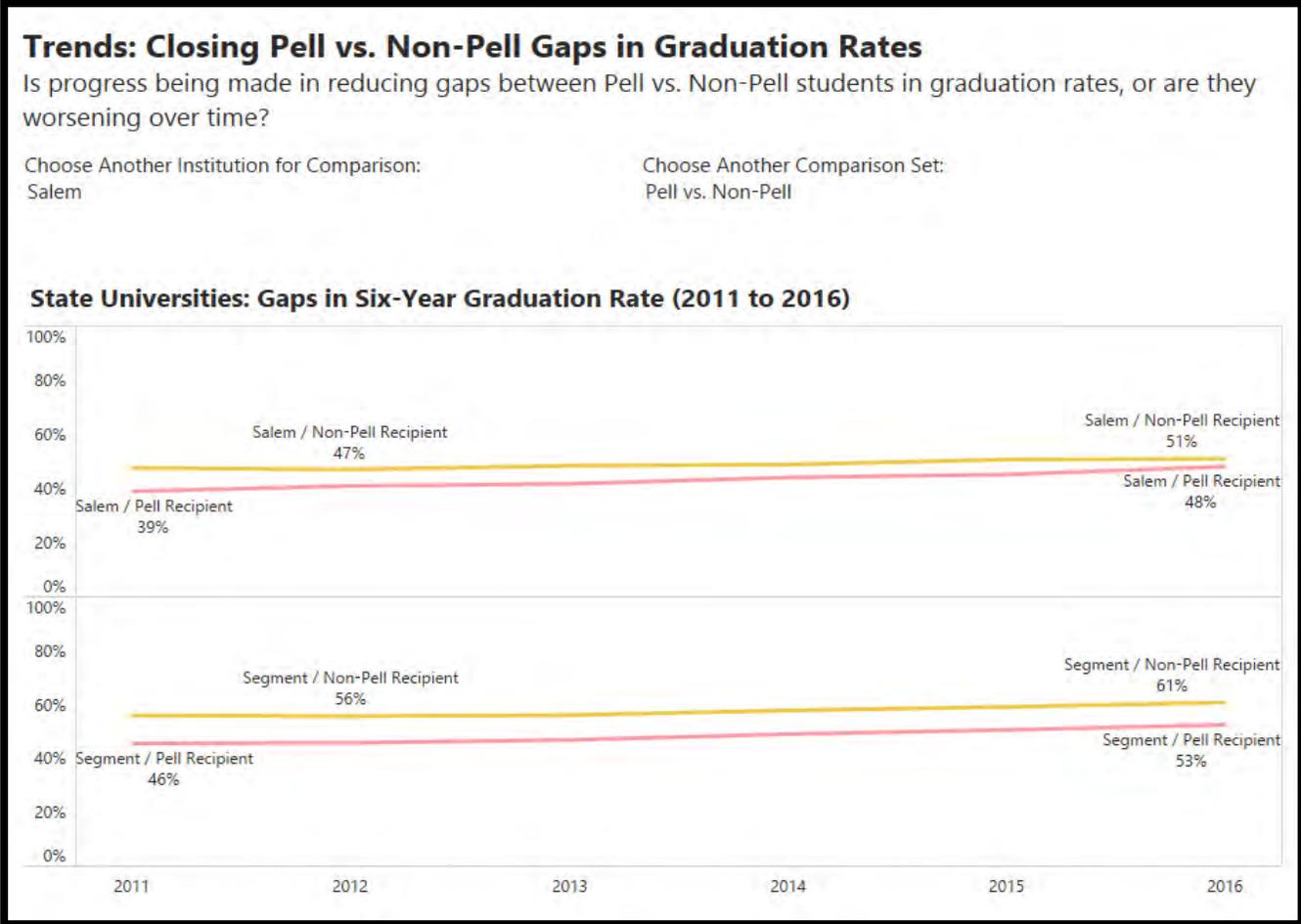
Choose Another Comparison Set:
Male vs. Female

State Universities: Gaps in Six-Year Graduation Rate (2012 to 2016)



Graph III

Salem State has one of the highest percentages of Pell eligible students in the state university system. Several factors contributed to the university’s success in closing the achievement gap for Pell eligible students. With the opening of the Student Navigation Center, we increased our efforts around financial literacy and expanded our work counseling financially at-risk students to assist them in managing the cost of attending the university. Efforts to inform parents about the business of being a student were increased to establish clearer expectations. Other institutional efforts to support student success included the Mapworks early warning survey and a robust First Year Experience program for students. MapWorks, in particular, has also provided valuable insight about this population, resulting in increased outreach and guidance around progression and resources (see Graph IV).



Graph IV

College Completion/Student Success

a. Retention Rates

After several years of steady progress, retention rates have slipped. Retention rates have been a priority for the university, as many resources have been devoted to increasing support services and providing a high quality living, learning experience. Resources have also gone into identifying why students are leaving. Some of the reasons include; 1) Affordability – some students with strong GPAs and low EFCs leave to attend a community college. Salem State hopes to counter this practice with our new financial aid leveraging strategy to focus aid where it is needed most. 2) Students with very low GPAs transfer to community colleges or drop out altogether. This occurrence is not surprising considering the shifting demographics in our catchment area. The university also completed the second year of a test optional pilot program to increase access to the institution for students who might not otherwise be considered (see Table IV).

Table IV: 1 Year Retention Rate – Salem State University

Fall Term	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
1 Year Retention Rate - Full Time Freshman	81.17%	79.86%	79.11%	77.17%
1 Year Retention Rate - Full Time Transfer*	81.77%	84.62%	82.19%	83.03%
*includes retained or graduated				

b. Graduation Rates

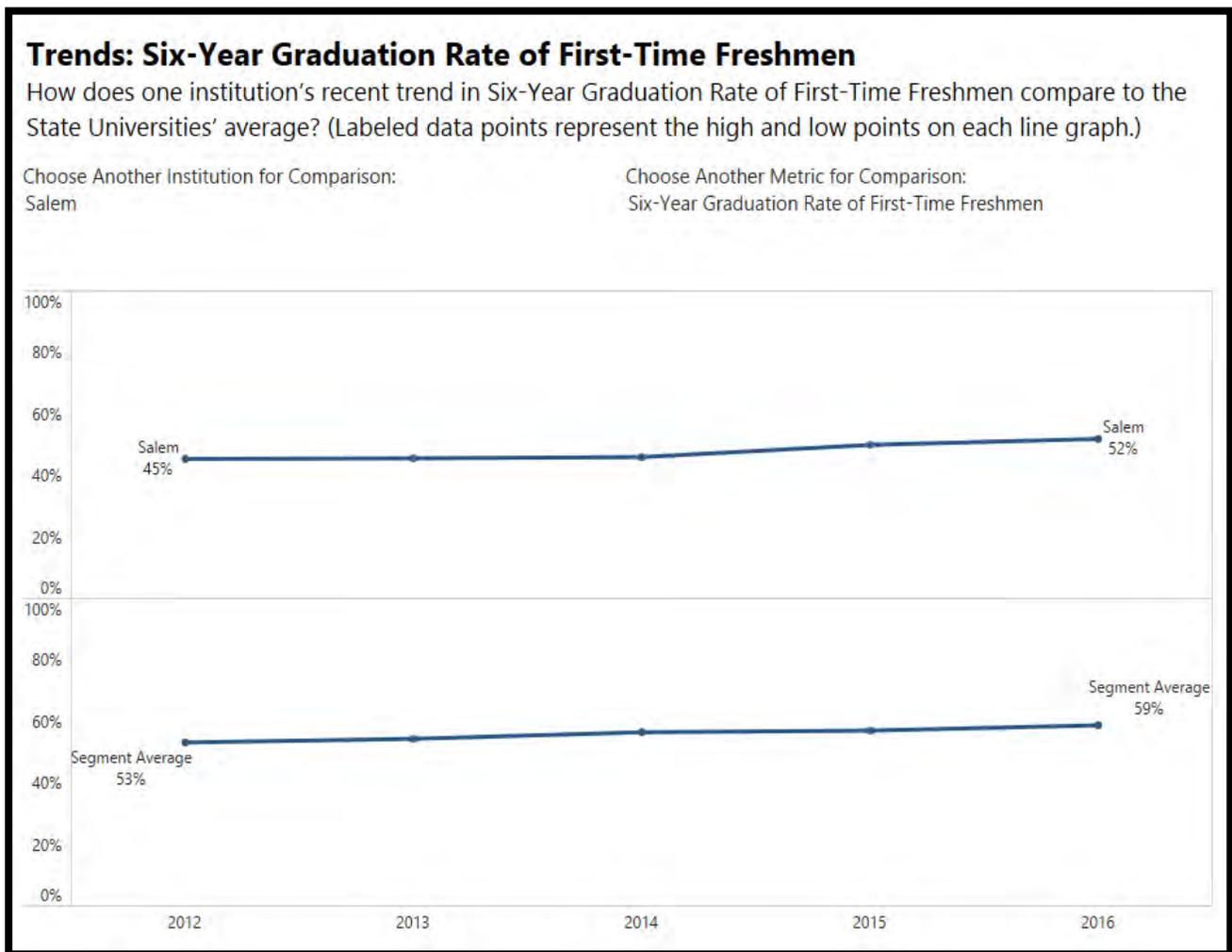
Graduation rates for first-time, full-time freshman and transfer students are at a six-year rate (six years from date of entry). We do continue to see progress in this area with the graduation rate for the class that entered in the fall of 2011 at 52%. Our next goal for 2021 is a 62 percent graduation rate for the class that entered in the fall of 2015 (see Table V and Graphs V and VI).

Increased outreach to community colleges by the Admissions Office, including the creation of a new Executive Director for Partnership Development and Outreach, have helped provide a more successful transfer experience for students to Salem State. As a result, we are working with students earlier in the process and assisting them with degree mapping while they are still at the community college, which has resulted in a much smoother transition to SSU, as well as keeping them on track to

graduate. In addition, the university’s active involvement in statewide efforts to increase the portability of courses and maximize the transfer of credits also supports transfer student completion. Graduation rates have also been buoyed by targeted outreach from Financial Aid, Registrar and Academic Advising to students who are close to graduating in order to motivate them to complete or to assist them in crossing the finish line.

Table V: 6 Years Graduation Rate - Salem State University

Fall Term	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
6 Years Graduation Rate - Full Time Freshman	45.90%	49.90%	51.52%	52.07%
6 Years Graduation Rate - Full Time Transfer	64.26%	67.46%	63.76%	63.02%



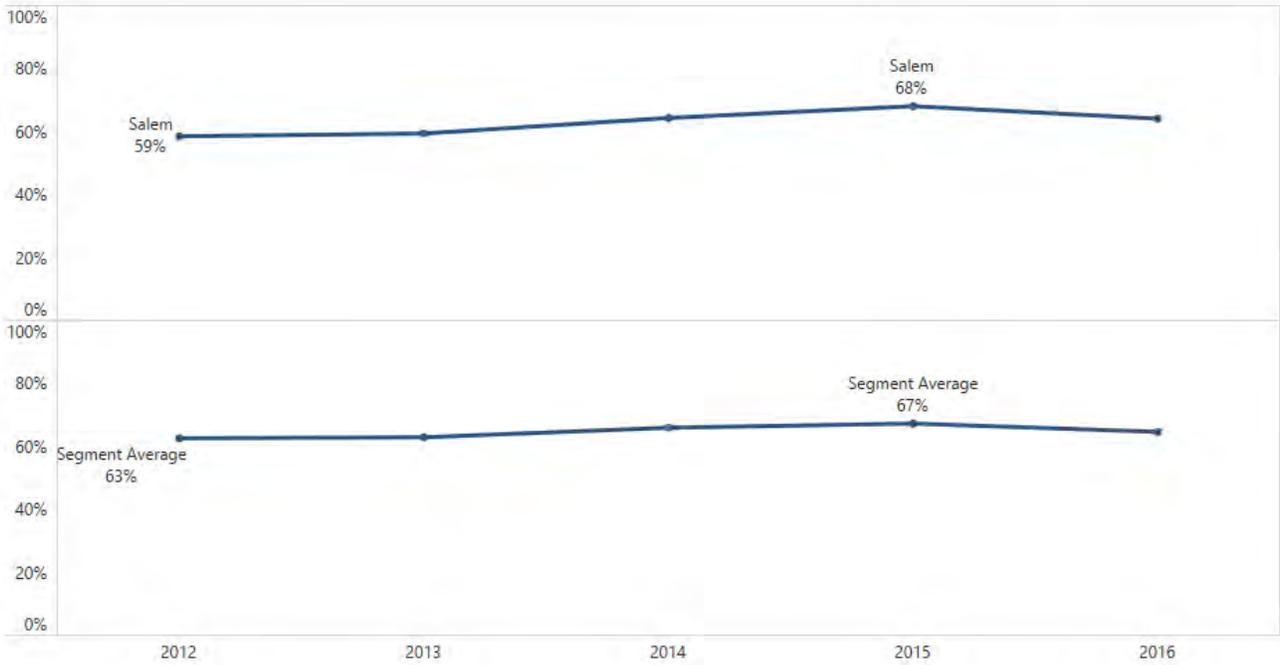
Graph V

Trends: Six-Year Graduation Rate of Transfer Students

How does one institution's recent trend in Six-Year Graduation Rate of Transfer Students compare to the State Universities' average? (Labeled data points represent the high and low points on each line graph.)

Choose Another Institution for Comparison:
Salem

Choose Another Metric for Comparison:
Six-Year Graduation Rate of Transfer Students



Graph VI

c. Healthcare & STEM

The demand for majors that require laboratory courses far exceeds current facilities. Salem State routinely caps nursing and biology majors due to the limits of available lab space. Over 83% of students who apply for the nursing program are not accepted. For the past few years, we have closed admission to biology in April due to capacity challenges and we increased the GPA requirement, which limits access to this major for students in our region. Salem State has also seen an increase in the demand for the healthcare studies major, while not yet offering a clinical component due to the university lacking sufficient lab space. Frankly, Salem State could grow this major even more if the facilities to support the growth were available. In addition, the necessity for support courses in other majors with lab requirements, as well as for general education courses in the sciences, demonstrates the urgent need to increase lab capacity. It is not possible to quantify how many students may be turned away due to the limits of current facilities; however, increasing both the quantity and the caliber of university labs will pay dividends in maximizing undergraduate access, retention, and graduation (Table VI).

Table VI: Healthcare & STEM vs. Other Fields

	2015	2106	2017
Salem			
Health Care	13%	11%	11%
STEM	6%	8%	9%
Other Fields	81%	81%	80%
Bridgewater			
Health Care	2%	1%	2%
STEM	8%	9%	8%
Other Fields	90%	90%	90%
Fitchburg			
Health Care	9%	10%	9%
STEM	13%	13%	17%
Other Fields	78%	77%	74%
Framingham			
Health Care	8%	6%	8%
STEM	12%	13%	15%
Other Fields	80%	81%	77%

Mass Maritime			
Health Care	0%	0%	0%
STEM	71%	76%	81%
Other Fields	29%	24%	19%
Mass Art			
Health Care	0%	0%	0%
STEM	0%	0%	0%
Other Fields	100%	100%	100%
MCLA			
Health Care	2%	1%	1%
STEM	14%	22%	13%
Other Fields	84%	77%	86%
Westfield			
Health Care	2%	3%	3%
STEM	8%	10%	9%
Other Fields	90%	87%	88%
Worcester			
Health Care	24%	26%	24%
STEM	13%	11%	13%
Other Fields	63%	63%	63%

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
a. Faculty and Staff	Increase the percentage of full-time faculty/staff of color to 35% across all departments by 2019.	Assess intentional recruitment efforts and create support systems for the aforementioned recruited faculty and staff. Field candidates who have experience with working students from marginalized communities	Human Resources	Update university on the following dates: February 15th 2018 September 15th 2018 January 15th 2019	Staff of color increased from 18.2% to 19.7% (Fall 2016-Fall 2017) and faculty increased from 18.5% to 21.1% during the same period.
b. University Police	Increase staff of color within the University Police Department. Mandatory implicit bias training on race, gender and sexuality.	Assess recruitment efforts and update the university community. Ensure training on cultural competency is provided to University Police staff.	Gene Labonte University Police	Offered in the Summer 2018	In June 2018, the Anti-Defamation League/United States Holocaust Memorial Museum will conduct Anti-Bias and Diversity Training for SSU Police.
c. The Office of Institutional Diversity & Equity (OIDE)	Create institutional policies to address systemic inequalities, bias incidents, and campus climate at Salem State University.	Establish the inaugural Office of Institutional Diversity & Equity ran by the Chief Diversity Officer. Discontinue the use of "Inclusive Excellence" (OIE) Brand	President Keenan	Replace OIE with OIDE by February 26th	A Bias Response Team was established by President Keenan in April 2018. The purpose of the team is to evaluate, address, and recommend proactive measures that will assist us in understanding and eliminating institutional cultural

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
					<p>norms that allow bias incidents to occur within our community.</p> <p>The Climate Study Implementation Team was established in November 2017 to review the Campus Study results and propose policies and initiatives to improve campus climate.</p>
d. Vice President (VP) and Chief Diversity Officer (CDO)	Appointment of a VP and CDO	Hire an individual as VP/CDO to run The OIDE with adequate full time administrators and support staff to address institutional concerns.	President Keenan Chair of Search Committee appointed by President Keenan	Full time CDO position filled by Fall 2018	One year interim appointment named, effective June 3, 2018 (R. Comage)
e. CDO Hiring Process	BBP Representation in the hiring process for CDO.	Two (2) Black, Brown, and Proud (BBP) Representatives on the search committee.	Chair of Search Committee appointed by President Keenan	Begin the processes February 15th 2018	N. Bryant will lead the search committee for the new VP/CDIO. There will be BBP representation on the committee.
f. Ensure Accountability to Students	Monthly meetings between BBP and University Leadership	Schedule a two hour meeting per month with University Leadership, BBP.	President Keenan's Office	February: One (1) March: Two (2) April: One (1)	BBP/University Leadership meetings were held in

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
				May: N/A	February and April 2018.
g. Diversity Power Dynamics and Social Justice General Education Requirement	Ensure courses apart of the Diversity Power Dynamics and Social Justice core curriculum are taught by qualified professors.	BBP involvement in committee review process of classes applying to the core curriculum.	Provost Silva Keja Valens (Faculty Curriculum Committee Rep.)	Effective Immediately Spring 2018	18 new courses have been approved for the coming academic year (AY18-19); another 15 courses are in the faculty governance approval process for future implementation. See attached list.
h. Equity Review Process	Include questions regarding experience working with students of color within higher education.	Periodically publish outcomes of the Equity Review Process to the campus community	Scott James Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	Effective Immediately Spring 2018	Equity reviews have been implemented at key stages of searches to ensure appropriate diversity representation. This has provided opportunities for HR and the Inclusive Excellence Office to share best practices and other tools and resources to help committees and hiring managers attract candidates from diverse backgrounds.

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
i. Students of Color Learning Community (LC)	Develop a Women of Color LC, Men of Color LC, and Asian LC to aid in the academic support & retention of students of color.	Establish & sustain a Women of Color LC, Men of Color LC , and Asian LC offered at the beginning of every academic year to incoming Freshman Implement requirements to link LC to BEES/Brotherhood.	First Year Experience Mathew Chetnik	Offer to Fall 2018 Freshman class during Summer 2018 Orientation	FY Learning Communities will be offered to Women of Color and to Men of Color in AY 18-19.
j. Honors Program	Increase amount of students of color in the honors program.	Review and amend efforts to recruit students of color to the honors program.	David Silva Lee Brossoit Scott Nowka	Planning to being Spring 2018 for rollout beginning Summer/Fall 2018	An increase is expected in AY18-19. See attached document for details.
k. Training	Faculty be provided training opportunities designed to increase individual cultural competency.	Encourage faculty to attend university sponsored training by providing them "Service to Community" credit.	David Silva	In Spring 2018 provide BBP documentation of training opportunities provided to faculty/staff	Inclusive Excellence Ambassadors being launched in Summer 2018. In addition, Academic Affairs, in conjunction with faculty leaders and the Inclusive Excellence Office, has set up a two-day diversity and inclusion training for faculty for May 23 and 24, 2018.

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
					<p>Additional trainings include:</p> <ul style="list-style-type: none"> • The Power of Respectful Language (1,068 employees totaling 168.4 hours as of 5/4/18) • Uncovering Implicit Bias (1,034 employees totaling 288.6 hours as of 5/4/18) • Culture Coaching: The Power to Transform Leaders and Institutional Climate (February 2018) • Black Student Success on Your Campus: Increase Recruitment, Retention, Engagement, & Completion (February 2018; a DVD is available for sign-out) • Sharing Stories: Fostering Empathy (April 2018, Navigator Center staff of 50 employees)

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
l. Workshops	Members of the campus provide workshops in the area of diversity, racial equity, and social justice.	Bi-annual workshops on diversity for faculty, staff and administration and encourage attendance. Supporting and providing.	Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	In Fall 2018 provide BBP a list of workshops	See Category K for May Professional Development training details.
m. Bias Response Protocol	Develop and refine a Bias Response Protocol in the website.	Form a Bias Response Team comprised of students, faculty, and staff to assess and efficiently respond to on-campus bias incidents.	Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	By end of Spring 2018 Begin revised Bias Response Protocol/Team	Bias Response Working Group has developed a workflow, and Pres. Keenan has charged the Bias Response Team which will oversee this work.
n. Scholarships for Students of Color	Raise university scholarship funds that will benefit students of color.	Create and advertise scholarship opportunities for incoming students of color.	Cynthia McGurren & The Office of Institutional Diversity & Equity	Effective Immediately Spring 2018	The President's Diversity Scholarship was established in January 2018, made possible through fundraising in honor of President Keenan's inauguration and the MOST Scholarship; \$5,270 in funds will be awarded in FY19. There are also two one-time awards available for next

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
					<p>academic year: one for a male student of color and one for Latino student/s.</p> <p>A five-figure funding proposal to support the Brotherhood and Bees has been submitted to a private foundation and we are awaiting a response.</p>
o. Budget Review	Increase the retention rate of students of color through reallocation of resources within the university.	Assess the budget of departments that focus on students of color (CAE, Student Advocacy, and Diversity and Multicultural Affairs Office).	President's Executive Council	By the end of Spring 2018, provide BBP with assessment summary	FY19 budget still under review.
p. Student Success Initiatives	Provided increased funding for Diversity and Multicultural Affairs office.	Provide BEES and Brotherhood adequate budget for programs involving student retention.	President's Executive Council	By the end of Spring 2018, provide BBP with assessment summary	FY19 budget still under review.
q. Orientation	Intensive dialogue on Diversity, power dynamics and equity during Summer Orientations.	Mandatory diversity session(s) with the goal of increasing cultural competency.	Carla Panzella Lauren Hubacheck	In the second meeting of Spring 2018, provide BBP with Orientation plans for 2018	Programming expected as part of 2018 orientation.

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
r. Space Allocation	Larger location for the Center of Diversity and Cultural Enrichment.	Provide BPP tentative architectural design of future center space within Ellison Campus Center Building.	Carla Panzella Rebecca Comage	Spring 2018 provide BBP with floor plans Begin implementation design implementation Summer 2018	Larger space has been identified.
s. Culturally Engaging Campus Environment	In applying the CECE model, increase full time staff within the Diversity and Multicultural Affairs (DMA) office.	Hire two full time Administrators in DMA. One as the Racial Equity Program Coordinator (PC), the other as the Gender and Sexuality PC.	Rebecca Comage	Spring 2018 behind hiring process. Fill the two full time positions by Summer 2018	DMA transitioned to LEAD with restructured staffing of additional Associate Director and Program Coordinator (subject to funding).
t. Counseling within Diversity and Multicultural Affairs (DMA)	Provide DMA office a full time counselor able to assist their success.	Hire a full time Multicultural Counseling Specialist dedicated to students of color within the center.	Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	Spring 2018 behind hiring process. Fill the full time position by Summer 2018	Under review.

General Education: Diversity, Power Dynamics, and Social Justice Courses

Item #	Description	Type of Action	Date Received	Sent to Committee	Approved	AUC Approved	Sent to Pres/Provost	Approved by Pres/Provost	Effective Date
18:021	SOC240-Contemporary Social Problems	Change in Course-DPDS	6/28/2017	Curriculum	CC17/18:06	17/18:04	1/31/2018	2/10/2018	FALL2018
18:022	SOC345-Race and Ethnicity in Society	Change in Course-DPDS	6/28/2017	Curriculum	CC17/18:06	17/18:04	1/31/2018	2/10/2018	FALL2018
18:033	ENL253-American Ethnic Literatures Since WWII	Change in Course-DPDS	9/11/2017	Curriculum	CC17/18:05	17/18:03	12/18/2017	1/9/2018	FALL2018
18:034	ENL352-U.S. Latino/a Literature	Change in Course-DPDS	9/11/2017	Curriculum	CC17/18:05	17/18:03	12/18/2017	1/9/2018	FALL2018
18:040	POL303-Grassroots Politics	Change in Course-DPDS	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:041	POL309-Introduction to Feminist Theory	Change in Course-DPDS, W-II	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:042	POL327-Race in American Politics	Change in Course-DPDS	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:043	POL328-Immigration and US Politics	Change in Course-DPDS	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:049	THE101-Introduction to Theatre Arts	Change in Course-DPDS	9/29/2017	Curriculum					
18:050	IDS232-American Identities	Change in Course-DPDS	9/29/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	FALL2019
18:079	SWK270-Understanding Diversity and Cultural Competence in Human Services	Change in Course-DPDS	10/5/2017	Curriculum					
18:086	MCO230-Media and Race	New Course-DPDS	10/10/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:087	COM274-Gender, Media, and Communication	Change in Course-DPDS	10/10/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:089	COM304-Mass Media and Society	Change in Course-DPDS	10/10/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:124	DAN330-Hip Hop Dance History	New Course-DPDS	10/12/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	FALL2018
18:125	DAN320-Modern Dance History	New Course-DPDS	10/12/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	FALL2018
18:127	DAN100-Introduction to Dance	Change in Course-DPDS	10/12/2017	Curriculum	WITHDRAWN	-----	-----	-----	-----
18:147	SPN382-Latinx Immigration: Context and Representation	Change in Course-DPDS	10/14/2017	Curriculum					
18:148	SPN420-US Latino Literature in Spanish	Change in Course-DPDS	10/14/2017	Curriculum					
18:155	BHS201-Health Disparities in the U.S. in the 21st Century	New Course-CS, DPDS	10/15/2017	Curriculum					
18:162	ENL354-Native American Literature	Change in Course-DPDS	10/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:163	ENL255-African American Literature I	Change in Course-DPDS	10/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:164	ENL256-African American Literature II	Change in Course-DPDS	10/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:165	OCT407N-OT Analysis & Intervention I	Change in Course-DPDS	10/16/2017	Curriculum					
18:180	GPH379-Environmental Justice	Change in Course-DPDS	10/16/2017	Curriculum					
18:190	PSY333-Psychology of Gender	Change in Course-DPDS	10/30/2017	Curriculum					
18:191	PSY344-Topics in Social and Cultural Diversity	Change in Course-DPDS	10/30/2017	Curriculum					
18:192	PSY355-African American Psychology	Change in Course-DPDS	10/30/2017	Curriculum					
18:210	ENL290-Fictions of Gender and Sexuality	New Course-DPDS	11/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:214	CRJ360-Racial Minorities, Crime, and Criminal Justice	Change in Course-DPDS	12/1/2017	Curriculum					
18:215	CRJ240-Bias Crime	Change in Course-DPDS	12/1/2017	Curriculum					
18:216	CRJ365- Gender & the Criminal Justice System	Change in Course-DPDS	12/1/2017	Curriculum					
18:235	IDS385-Community Organizing	Change in Course-DPDS	2/20/2018	Curriculum					
18:242	THE101-Introduction to Theatre Arts	Change in Course-DPDS	2/27/2018	Curriculum					



**Commonwealth Honors Program (CHP)
at Salem State University**
(as of April 26, 2018)

CHP Admissions Data, Spring 2018 → Class of 2022

Self-ID Category	Admitted		Deposited	
	N	%	N	%
Asian	35	11%	4	10%
Black/African-American	28	9%	1	3%
Capeverdean	2	1%	0	0%
Hispanic	36	11%	4	10%
None chosen	7	2%	0	0%
Two or more	12	4%	0	0%
White	204	63%	31	78%
Total	324	100%	40	100%

Final figures are pending:

1. *final orientation (August)*
2. *confirmed enrollment by each student in at least one honors section (September)*

Winter/Spring 2018 Outreach (to current first-year students) -- completed

Provost Postcard: to all SSU first-year students with F17 qualifying GPA
 Follow-up E-mail: to students of color who received the postcard
 Informational Breakfast: to students of color who received the follow-up e-mail
 Result: Six (6) new students of color to enter the CHP F18 (as sophomores)

Planned Outreach (for AY18-19)

- NEW: Change in CHP scholarship program: broader coverage
- NEW: Targeted outreach of students of color during fall '18 for entrance to the CHP in spring '19 – continued consultation with Professor S. Oliver
- REPEAT: Postcard + E-mail + breakfast sequence in January 2019 (eligibility based on fall '18 grades)
- NEW: Outreach to advisees of qualified students of color so that advisors can encourage advisees

SUBJECT: Finance & Facilities Committee Meeting Report for May 23, 2018

The Finance & Facilities Committee of the Board of Trustees met on Wednesday, May 23, 2018, in the Petrowski Room, Marsh Hall on the Central Campus of Salem State University.

Present for the Committee: Trustees Katzman (chair), Murphy (vice chair), Russell (via phone), Scott (via phone), Veira, Chair Mattera (ex-officio), President Keenan (ex-officio), Mr. Gadenne (advisory member). Also present and participating: Vice President House (committee liaison) and staff assistant Beaulieu.

Absent for the Committee: None

*In accordance with the Open Meeting Law all votes taken during this meeting, in which a member participated remotely, were by roll call vote.

Trustee Katzman, committee chair, called the meeting to order at 3 pm.

Capital projects status update (Attachment A)

The Massachusetts State College Building Authority (MSCBA) is funding and managing a roof replacement on Bowditch Hall this summer.

The university expects to hear by the end of the summer on the status of the Science Teaching Lab Addition project proposal. The state will release \$10 million in FY19 spending for approved major capital projects. In addition, the Division of Capital Asset Management and Maintenance (DCAMM) will allocate \$37 million for deferred maintenance in FY19 to the 29 higher education institutions. Each institution will receive \$1 million and the balance of \$8 million will be distributed on a formula based method. The university currently has \$253 million of deferred maintenance needs (10 years).

Investment management services contract renewal (Attachments B, B-1)

The Committee voted to recommend exercising the final renewal year with Eastern Bank Wealth Management beginning December 16, 2018.

Trustee Russell made the following motion, seconded by Trustee Murphy:

MOTION

The Finance and Facilities Committee hereby recommends that the Board of Trustees approve the following motion:

Recommended motion

The Board of Trustees of Salem State University hereby approves the reappointment of Eastern Bank Wealth Management to provide investment management services for certain Salem State University trust funds and authorizes the administration of the university to renew the contract for one year beginning December 16, 2018.

The resolution is effective upon its approval.

Voting in the affirmative: Katzman, Murphy, Russell (via phone), Scott (via phone), Veira

Voting against: None

The motion passed.

Review of FY18 Q2 financials (Attachment C)

An amended FY18 Q3 financial report was distributed and discussed.

Undergraduate fees for FY2019 (Attachments D,E)

A summary on the proposed FY2019 budget and fees highlighted information provided in the budget and fee package (Attachment D). Lengthy discussion took place. Highlights included student affordability; financial health of the institution; financial aid; program costs; hiring freeze; budget assumptions and uncertainties. The proposed FY2019 All Funds Budget with the recommended FY2019 fees proposed is a breakeven budget.

A motion was made by Trustee Russell (via phone) and seconded by Trustee Scott (via phone).

MOTION

The Finance and Facilities Committee hereby recommends that the Board of Trustees approve the following motion pertaining to fees for FY2019.

Recommended motion

The Board of Trustees of Salem State University hereby approves the fees as shown in the attached tuition and fee rate schedule (Appendix IV). The new rates shall be effective for the 2018-19 academic year (FY2019). The president and other officers of the university are hereby authorized to do all things and take all actions deemed necessary to implement this decision.

Voting for the motion: Katzman, Murphy, Russell (via phone), Scott (via phone), Veira

Voting against the motion: None

The motion passed.

Recommendation of FY19 All Funds Budget (Attachment F)

A motion was made by Trustee Murphy and seconded by Trustee Scott (via phone).

MOTION

The Finance and Facilities Committee hereby recommends that the Board of Trustees approve the following motion pertaining to the attached FY2019 Salem State University All Funds Budget as described in Attachment F.

Recommended motion

The Board of Trustees of Salem State University hereby approves the Fiscal Year 2019 All Funds Budget as recommended by the president and as shown in the attached FY2019 Salem State University All Funds Budget at the level of \$172.3 million in Managed Expenses. This action includes approval of the FY2019 Trust Fund Budgets and the Contracts Exceeding \$500,000 each as included in the budget package. The president and other officers of the university are hereby authorized to do all things and take all actions deemed necessary to implement this decision.

Voting in the affirmative: Katzman, Murphy, Russell (via phone), Scott (via phone), Veira

Voting against: None

The motion passed.

Investment advisors – 2 of 2 required annual meetings (Attachment G)

Eastern Bank Wealth Management representatives John Doherty and Michael Tyler discussed Salem State University's investment portfolio as of March 31, 2018. Highlights included review of the portfolio, performance, fossil fuel divestment and impact strategy, economic outlook, current posture of asset allocation and market monitor.

There being no further business to come before the committee, Trustee Murphy moved and Trustee Scott (via phone) seconded a motion to adjourn.

MOTION: to adjourn the meeting.

Voting in the affirmative: Katzman, Murphy, Russell (via phone), Scott (via phone), Veira

Voting against: None

The motion passed.

The meeting adjourned at 4:27 pm.

Prepared by: D. Beaulieu, staff assistant, finance and facilities

Attachment A

BOT/Finance & Facilities Update on Capital Projects
May, 2018

CONSTRUCTION – COMPLETED

O’Keefe façade repairs Completed: 4/2018
Construction budget: \$777,000 (\$306,891 DCAMM funds) - actual \$781,635

- Repair of the exterior walls of the apparatus gym to eliminate water infiltration

Meier Hall steam line repair – Phase 2 Completed: 2/2018
Construction budget: \$255,065 - actual \$352,365

- Repair second portion of steam line that feeds Meier Hall
- Steam line has been installed and connected. Landscape work will be completed in the spring.

CONSTRUCTION – FUTURE

Meier Hall roof replacement - Phase 1
Construction budget: \$1,892,875 (\$753,344 DCAMM funds) Anticipated completion: 8/2018

- Replacement of half of the Meier Hall roof
- Currently out to bid

Berry Library perimeter heating upgrade
Construction budget: \$232,000 (\$232,000 DCAMM funds) Anticipated completion: 8/2018

- Installation of additional perimeter radiation to address heating issues
- Currently out to bid

Sullivan Building roof improvement
Construction budget: \$550,000 (\$272,193 DCAMM funds) Anticipated completion: 8/2018

- Insulating the roof structure to prevent ice damming and water infiltration
- Currently out to bid

PROJECTS IN PLANNING/STUDIES

Administration Building roof replacement study
Project budget: \$26,200 Anticipated completion: Fall 18

- DCAMM certified study for roofing replacement

Meier Hall science teaching lab addition
Construction budget: \$64M Anticipated completion: TBD

- Application submitted to DCAMM on 12/22/17

Horace Mann Code Evaluation
Project budget: \$25,000 Anticipated completion: 6/2018

BOT/Finance & Facilities Update on Capital Projects May, 2018

PROJECTS IN PLANNING/STUDIES COMPLETED

Sullivan Basement Structural Evaluation

Project budget: \$10,500

Completed: 4/2018

- Structural analysis of former coalbunker in parking lot
- Initial repair estimate \$500,000. Repair work to be completed in FY19.

Parking assessment

Project budget: \$62,500

Completed: 4/2018

- Comprehensive parking assessment to evaluate, current conditions, impact from enrollment growth, divestment of south campus, and long term plans.
- Recommendation to investigate opportunities for expanding parking on existing property will begin this summer.

REQUEST FOR TRUSTEE ACTION

Date: October 8, 2014
To: Board of Trustees
From: Patricia Maguire Meservey, President
Subject: Investment Management Contract
Requested Action: Approval

A request for proposal (RFP) for investment management services was developed with the input of the Finance and Facilities Committee. On June 11, 2014 the RFP was issued by the university. A pre-conference for bidders was held June 25, 2014 to answer any questions regarding the RFP. The university received 13 proposals on July 23, 2014. Proposals were reviewed and rated on a scale of 0 – 3, low to high based on the criteria in the RFP. Four finalists with the highest scores were invited to make a presentation to the Finance and Facilities Committee on September 11, 2014. Members of the Finance and Facilities Committee listened to each of the finalists: Eastern Bank Wealth Management, Wilmington Trust, People’s United Bank and Citizens Bank. After the presentation the committee discussed the qualifications and various criteria each of the firms had to offer.

MOTION

The Board of Trustees of Salem State University hereby approves the appointment of Eastern Bank Wealth Management to provide investment management services for certain Salem State University trust funds and authorizes the administration of the university to enter into a three year contract with options to renew for two one year periods and a fee option based on 45 basis points with Eastern Bank Wealth Management beginning December 15, 2014 with provisions for termination of the agreement by either party with or without cause with thirty (30) days written notice.

This resolution is effective upon its approval.

Committee Assigned: Finance & Facilities
Committee Action: Approved
Date of Action: September 17, 2014

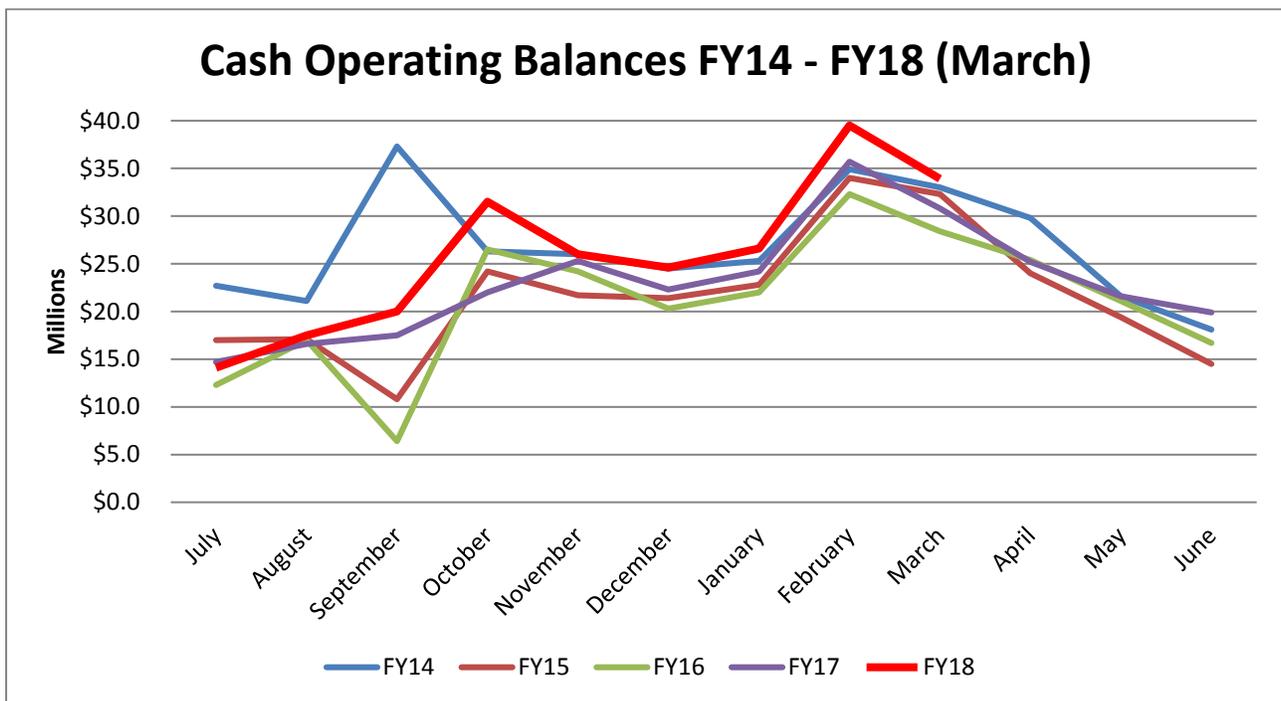
Trustee Action: Approved
Trustee Approval Date: October 8, 2014
Effective Date: October 8, 2014

**Salem State University
Interim Financial Review through the Third Quarter (Q3) of FY18 (3/31/18)
Commentary**

Introduction – The attached package includes a summarized Management Revenue & Expense Report that distinguishes between managed and non-cash revenue and expense activity, in addition to the traditional GAAP-style financial statements. Thus, the package for the period ending March 31, 2018, includes the following unaudited financial statements:

- Management Revenue & Expense Report
- Financial Statements by Trust Fund
- Statements of Net Position
- Statement of Cash Flows
- Statements of Revenues, Expenses and Changes in Net Position by Natural Classification

KEY ITEMS SUMMARY:



Summary Financial Information for FY17Q3 and FY18Q3

	<i>(In Thousands)</i>				Budget	Projection
	FY17Q3	FY18Q3	\$ Change	% Change	FY18	FY18
Managed Revenues	\$ 145,654	\$ 153,219	\$ 7,565	5.2%	\$ 172,671	\$ 168,595
Managed Expenses	118,773	123,096	4,323	3.6%	169,574	167,238
Managed Net Income	26,881	30,123	▲ 3,242	12.1%	3,097	▼ 1,357
Non Cash Revenue/(Expenses)	(5,536)	(6,984)	▼ (1,448)	26.2%	(9,524)	▼ (9,824)
Total Increase/(Decrease) in Net Position	\$ 21,345	\$ 23,139	▲ \$ 1,794	8.4%	\$ (6,427)	▼ \$ (8,467)

Balance Sheet – Cash and cash equivalents increased by \$15.7 million from the June 30, 2017 balance. In February, \$28.9 million in financial aid was disbursed and which decreased the accounts receivable balance and increased the University’s cash position. At March 31, 2018, the accounts receivable balance stood at \$10.3 million, an increase of \$4.4 million since June 30, 2017. The university registers degree seeking graduate students for Summer II semester courses in spring but does not require payment before the end of the fiscal year, resulting in high receivable balances in spring; the March 2018 balance is comparable to the third quarter of the previous year. Investments have risen by 8.5% or \$1.1 million to \$14.7 million since June 30 due to market conditions that have been strong but increasingly volatile. No new debt was incurred during the first three quarters of FY18.

Cash Operating Balances FY14 through FY18 (December) — Operating cash flows are cyclical as depicted in the cash graph, especially after October. MSCBA assessments and financial aid receipts have fallen on various sides of September 30. During the spring semester, both the MSCBA assessment and financial aid processing occur during February. The chart depicts operating cash balances by month and excludes cash with State and other agencies. Operating cash on hand at March 31, 2018 is higher than over the last several years and about equal to that for March 31, 2014 (FY14).

Revenue and Expense - For the nine months ending March 31, 2018 (FY18), Salem State’s net position increased by \$23.1 million overall which is \$1.8 million or 8.4% over the same period in FY17 (*See table*). For managed net income, the YTD result through the third quarter of FY18 is \$30.1 million. For the nine months ending March 31, 2018 (FY18), tuition and fee revenue net of scholarships and fellowships increased 3.1% or \$1.8 million year over year. This is predominately due to the increase in University fee rates and additional students paying differential fees as the applicability of the differential fee program rolled forward to entering students for a second year. Auxiliary enterprise revenue was 5.0% or \$1.1 million higher due to the increased student housing rates. Managed expenses increased \$4.3 million or 3.6% primarily due to the timing of an additional payroll compensation included in FY18 (19 payrolls were recorded in FY17 whereas 20 payrolls were recorded at the same point in FY18). Labor contracts were not settled as of the end of the third quarter, so annual compensation increases for unionized and nonunionized staff have not been processed. Labor increases, therefore, are not reflected in YTD actual expenses in FY18 although some had been processed by the same point in FY17. Subsequently, both the APA and MSCA (day faculty) contracts have reached agreement and are moving to the ratification process.

Changes in Non-Cash Revenues and Expenses – Non-cash revenues and expenses for the third quarter of FY18 decreased \$1.4 million. This is primarily due to an increase in depreciation expense of \$0.6 million together with an increase in unrealized losses of \$0.8 million due to market conditions. Capital grants are recorded during fiscal year end when the University receives the necessary information from DCAMM.

Comparison of Current FY18 Projection to Approved FY18 Budget – The forecast for the full fiscal year FY18, including an estimate for GASB 68 pension adjustment, is a decrease in net position of \$8.5 million, which is an unfavorable variance compared to the budgeted \$6.4 million decrease. However, managed net income before non-cash revenue and expenses is projected to be \$1.4 million positive. Managed net income is \$1.7 million unfavorable to budget. Significant FY18 budget variances are discussed below.

Managed Revenue and Expense Activity:

- An unfavorable variance of \$3.2 million in tuition and fees is anticipated, caused by Undergraduate headcount and Graduate and Continuing Education credit hours falling short of the budget targets.
- An unfavorable variance of \$0.4 million in State appropriations is caused by the Commonwealth's decision to not include formula based performance funding in its FY18 budget. Note that the projection assumes receipt of state support for the first year of the new union contracts.
- A favorable variance of \$1.0 million in compensation is primarily attributable to higher vacancy savings than expected.
- A favorable variance of \$0.7 million in Facility-related expenses is due to utility savings of \$0.4 million and a favorable variance in MSCBA Assessments of \$0.3 million.
- An unfavorable variance of \$0.5 million in Other Revenue relates to a decision about timing to receive a gift on hand with the Salem State University Foundation.

Non-Cash Revenue and Expenses:

- The projection includes a \$3.4 million favorable budget variance in capital grant revenue associated with the Sophia Gordon Performing Arts Center and Clean Energy Investment Program III projects (DCAMM.) These were originally expected in FY17 but will be recognized in FY18 due to timing of DCAMM activity and reporting.
- As is the university's practice, the budget does not include a calculation of the impact of GASB 68 pension liability adjustments for FY18 or GASB 75 Other Post-Employment Benefits, an accounting standards change which will be implemented during FY18. However, the projection for FY18 now includes an estimated \$3.7 million GASB 68 pension expense based on preliminary information received from the Commonwealth. Information to book these adjustments is maintained by and received from the Commonwealth as the books are closed for the fiscal year.

The Management Revenue & Expense Report displays the year to date activity through the applicable quarter of the prior year compared to the current year. The Statement of Net Position and related analysis compares the prior year's fiscal year-end balance to the balance at the end of the applicable quarter in the current year. This is done in order to focus on what changed in the current fiscal year. Similarly, the Statement of Cash Flows is presented through the end of the applicable quarter in the current year and shows the change in cash from the end of the prior fiscal year.

Financial reports and information herein are hereby certified by the President or designee, VP for Finance and Facilities Karen House, that all records were maintained in accordance with proper procedures, including documentation of receipts, disbursements and bank accounts, and that all expenditures were made to advance Salem State University's mission. The information is for the University without the inclusion of the Assistance Corporation and Foundation and is derived from the financial system of record (PeopleSoft) as the numbers stood when the period being reported was closed.

Management Revenue & Expense Report
(In Thousands)

	3rd Qtr FY 2017 (\$K)	3rd Qtr FY 2018 (\$K)	Year End FY 2017 (\$K)	Original Budget FY 2018 (\$K)	Projection FY 2018 (\$K)
Revenue:					
Tuition and Fees	\$ 82,036	\$ 85,188	\$ 84,587	\$ 90,298	\$ 87,139
Less: Scholarships, Fellowships & Waivers	(22,373)	(23,682)	(23,321)	(23,601)	(23,600)
Net Tuition and Fees	59,663	61,506	61,266	66,697	63,539
Federal, State, Private Grants	17,677	18,159	19,306	18,613	18,613
Auxiliary Enterprises	21,465	22,542	22,398	23,176	23,199
State General Appropriations	43,118	46,333	58,768	60,339	59,898
Other Revenue	3,731	4,679	4,516	3,846	3,346
Managed Revenue (A)	145,654	153,219	166,254	172,671	168,595
Expenses:					
Compensation	82,968	87,305	118,273	123,714	122,762
Support	13,708	12,181	17,992	19,077	18,393
Facility-related	22,097	23,610	24,670	26,783	26,083
Managed Expenses (B)	118,773	123,096	160,935	169,574	167,238
Managed Net Income (A-B)=(C)	26,881	30,123	5,319	3,097	1,357
Non-Cash Revenue/(Expenses):					
Capital Grants	-	-	7,711	-	3,400
Depreciation	(6,068)	(6,652)	(8,477)	(9,326)	(9,326)
Contribution to SSUAC	-	-	(896)	-	-
Unrealized Gains/Losses	532	(332)	738	(198)	(198)
GASB 68 Pension	-	-	(4,711)	-	(3,700)
Total Non-Cash Revenue/(Expenses)	(5,536)	(6,984)	(5,635)	(9,524)	(9,824)
Total Increase/Decrease in Net Position	\$ 21,345	\$ 23,139	\$ (316)	\$ (6,427)	\$ (8,467)
Management Cash Flow Ratio (C)/(A)			3.20%	1.79%	0.80%



Financial Statements by Trust Fund
March 31, 2018
(In Thousands)

Account Description	FY 2017 Year End (\$K)	Unrestricted Auxiliaries	Educational & General Funds	Grants	Gifts	Residence Halls	Restricted Other	Total Restricted Endowments	Net Invested in Capital Assets	FY 2018 3rd Qtr (\$K)
Operating Revenue:										
Net Tuition and Fees	\$66,893		\$84,315	(\$16,264)	(\$476)	(\$1,207)	\$597			\$66,965
Federal, State, Private Grants	19,306			18,158			1			18,159
Sales & Svcs Education Depts	1,333	\$313	702	21			112			1,148
Auxiliary Enterprises	22,398	2,113	339			19,821	269			22,542
Other Operating Revenues	365	15	318	2			1		\$8	344
Total Operating Revenue	110,295	2,441	85,674	1,917	(476)	18,614	980	-	8	109,158
Operating Expenses:										
Compensation	118,273	78	82,775	1,544	74	2,773	61			87,305
Support	23,276	116	15,067	489	263	833	562			17,330
Utilities	4,179	24	1,774			989				2,787
Depreciation and Amortization	8,477								6,652	6,652
MSCBA Assessment	14,049	1,443	65			12,213			633	14,354
Scholarships and Fellowships	5,627		5,414	27	18					5,459
GASB 68 Pension	4,711									-
Total Operating Expenses	178,592	1,661	105,095	2,060	355	16,808	623	-	7,285	133,887
Non-Operating Revenue/Expenses:										
State General Appropriations	58,768		46,222	111						46,333
Gifts	1,801	60	106	5	1,227		127			1,525
Investment Income	1,755		1,234	47				\$49		1,330
Contributions to SSUAC	(896)									-
Interest Expense	(1,157)		(66)						(1,254)	(1,320)
Capital Grants	7,710									-
Net Non-Operating Revenue/Expenses	67,981	60	47,496	163	1,227	-	127	49	(1,254)	47,868
Inter-Fund Transfers:										
Inter-Fund Transfers (Increase)/Decrease	-	(1,873)	6,053	(40)	40	(491)	96	-	(3,785)	-
Inter-Fund Transfers	-	(1,873)	6,053	(40)	40	(491)	96	-	(3,785)	-
Total Increase in Net Position	(\$316)	\$2,713	\$22,022	\$60	\$356	\$2,297	\$388	\$49	(\$4,746)	\$23,139

Statements of Net Position
(In Thousands)

	FY 2017	FY 2018 YTD	Change	
	Year End	March 31	\$	%
Assets:				
Cash	\$ 16,941	\$ 33,940	\$ 16,999	100.3%
Cash with State and other agencies	3,514	2,165	(1,349)	-38.4%
Accounts and other receivables	5,959	10,335	4,376	73.4%
Capital assets	172,648	169,083	(3,565)	-2.1%
Investments	13,544	14,692	1,148	8.5%
Loans receivable, net	2,028	2,020	(8)	-0.4%
Debt Service Reserve	1,473	1,473	-	0.0%
Other Assets	406	141	(265)	-65.3%
Total Assets	216,513	233,849	17,336	8.0%
Deferred Outflows	19,627	19,627	-	0.0%
Total Assets and Deferred Outflows of Resources	\$ 236,140	\$ 253,476	\$ 17,336	7.3%
Liabilities:				
Accounts payable and accrued expenses	\$ 4,036	\$ 4,199	\$ 163	4.0%
Accrued Payroll	7,711	5,156	(2,555)	-33.1%
Bonds and notes payable	45,297	43,200	(2,097)	-4.6%
Compensated absences	9,760	9,760	-	0.0%
Loan payable, federal financial assistance programs	2,190	2,190	-	0.0%
Other liabilities	4,621	3,498	(1,123)	-24.3%
Net Pension Liability	46,973	46,973	-	0.0%
Total Liabilities	120,588	114,976	(5,612)	-4.7%
Deferred Inflows	4,888	4,697	(191)	-3.9%
Total Liabilities and Deferred Inflows of Resources	125,476	119,673	(5,803)	-4.6%
Net Position:				
Invested in capital assets	131,099	125,721	(5,378)	-4.1%
Restricted	5,985	8,803	2,818	47.1%
Unrestricted	(26,420)	(721)	25,699	-97.3%
Total Net Position	110,664	133,803	23,139	20.9%
Total Liabilities, Deferred Inflows of Resources and Net Position	\$ 236,140	\$ 253,476	\$ 17,336	7.3%



Statement of Cash Flows
(In Thousands)

	YTD 03/31/18 FY 2018
	<u> </u>
Cash flow from operating activities:	
Tuition and fees (net)	\$ 78,413
Grants and contracts	18,469
Payments to vendors, employees and students	(114,966)
Auxiliary and other receipts	<u>4,299</u>
Net cash used in operating activities	<u>(13,785)</u>
Cash flow from non-operating activities:	
State appropriations (net)	35,309
Gifts, investment and other sources	<u>948</u>
Net cash provided by non-operating activities	<u>36,257</u>
Cash flow from capital, financing and investing activities:	
Purchases of capital assets	(3,202)
Debt service payments on bond payables	(3,754)
Investment activities (net)	<u>134</u>
Net cash used in capital financing, and investing activities	<u>(6,822)</u>
Net increase in cash and cash equivalents	15,650
Cash and cash equivalents at beginning of period	20,455
Cash and cash equivalents at end of period	<u><u>\$ 36,105</u></u>

Statements of Revenues, Expenses and Changes in Net Position by Natural Classification
(In Thousands)

	<u>Year to Date through March 31</u>		<u>Full Fiscal Year</u>		
	<u>FY 2017</u>	<u>FY2018</u>	<u>FY 2017</u>	<u>FY2018</u>	<u>FY2018</u>
	<u>Actual</u>	<u>Actual</u>	<u>Actual</u>	<u>Budget</u>	<u>Projection</u>
Operating Revenues:					
Tuition and fees	\$ 82,036	\$ 85,188	\$ 84,587	\$ 90,298	\$ 87,139
Less: scholarships and fellowships	(16,914)	(18,223)	(17,694)	(17,204)	(17,200)
Net tuition and fees	<u>65,122</u>	<u>66,965</u>	<u>66,893</u>	<u>73,094</u>	<u>69,939</u>
Federal, state and private grants	17,677	18,159	19,306	18,613	18,613
Sales and services of educational departments	1,089	1,148	1,333	1,275	1,275
Auxiliary enterprises	21,465	22,542	22,398	23,176	23,199
Other operating revenues	149	344	365	191	191
Total Operating Revenues	<u>105,502</u>	<u>109,158</u>	<u>110,295</u>	<u>116,349</u>	<u>113,217</u>
Operating Expenses:					
Compensation and benefits	82,968	87,305	122,984	123,714	126,462
Supplies and services	32,096	31,684	37,325	39,550	38,573
Utilities	2,927	2,787	4,179	4,407	4,000
Depreciation	6,068	6,652	8,477	9,326	9,326
Scholarships and fellowships	5,459	5,459	5,627	6,397	6,400
Total Operating Expenses	<u>129,518</u>	<u>133,887</u>	<u>178,592</u>	<u>183,394</u>	<u>184,761</u>
Non-Operating Revenues/Expenses:					
State appropriations, net	43,118	46,333	58,767	60,339	59,898
Gifts	1,629	1,525	1,801	2,056	1,556
Investment income	1,396	1,330	1,755	125	125
Interest expense on bonds & other debt	(782)	(1,320)	(1,157)	(1,902)	(1,902)
Other non-operating expenses	-	-	(896)	-	-
Net Non-Operating Revenues/Expenses	<u>45,361</u>	<u>47,868</u>	<u>60,270</u>	<u>60,618</u>	<u>59,677</u>
Capital grants	-	-	7,711	-	3,400
Total Increase (Decrease) in Net Position	<u>\$ 21,345</u>	<u>\$ 23,139</u>	<u>\$ (316)</u>	<u>\$ (6,427)</u>	<u>\$ (8,467)</u>
Operating Cash Flow Ratio			2.2%	1.5%	0.8%

Salem State University

Board of Trustees

Finance and Facilities Committee

FY19 Budget & Fees

5/23/18

Karen House

Vice President for Finance and Facilities

Proposed Tuition and Fee Rates for FY19

Degree Category	Tuition and Fees	Room and Board**	Total	% Increase
Undergraduate: In-State	\$10,884	\$12,722	\$23,606	5%
Undergraduate: Out-of-State	\$17,640	\$12,722	\$30,362	5%

- Salem State Tuition and Fees as % of Median Income in FY16 was 10.2% (last available data) when tuition & fees was \$9,246.
 - State Universities excluding MCAD and MMA was 10.0%
 - Northeastern States Average was 11.1%
- FY19 budget includes second annual additional increase of \$700K in institutionally funded financial aid.

Tuition & Fee Rate Change Impact				
% Change in Undergrad Tuition & Fees	FY 2019 Budget Impact (in \$M)	Rate Change From FY18	Rate	New Rate For FY19
4.0%	\$(1.0)	\$411	\$10,689	\$10,689
5.0%	\$(0.5)	\$514	\$10,792	\$10,792
5.9%	\$0.0	\$606	\$10,884	\$10,884
7.0%	\$0.6	\$719	\$10,997	\$10,997
8.0%	\$1.1	\$822	\$11,100	\$11,100
Note: all calculations based on In-state UG Day Tuition, University Fee, Capital Improvement Fee, and SGA Fee				
5.9% is the current rate for the FY 2019 budget.				

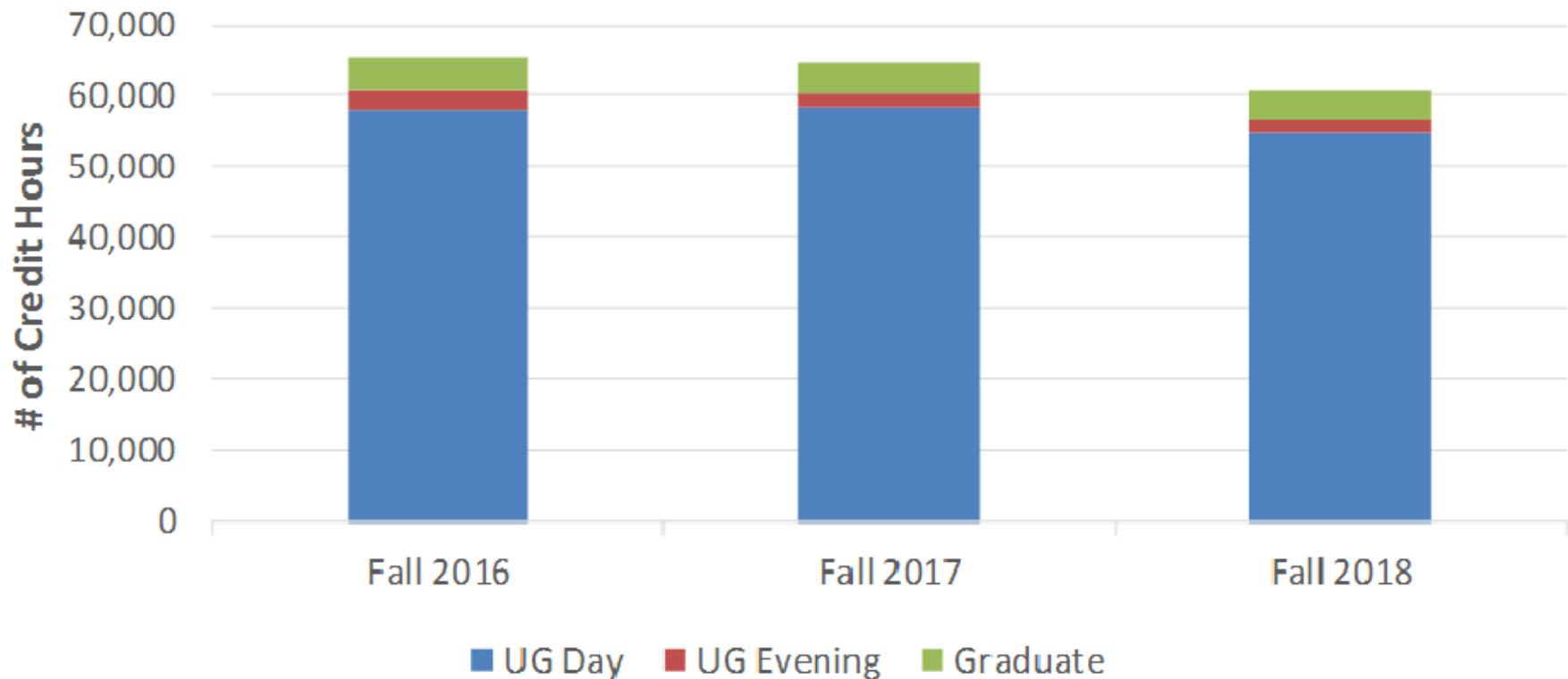
In-State Undergraduate Tuition & Mandatory Fees - Current Year

Institution	FY2018
University of Massachusetts Amherst	15,412
University of Massachusetts Lowell	14,800
University of Massachusetts Boston	13,828
University of Massachusetts Dartmouth	13,572
Massachusetts College of Art and Design	12,700
Salem State University	10,278
Fitchburg State University	10,154
Massachusetts College of Liberal Arts	10,136
Bridgewater State University	10,012
Framingham State University	9,920
Westfield State University	9,716
Worcester State University	9,532
Massachusetts Maritime Academy	8,398

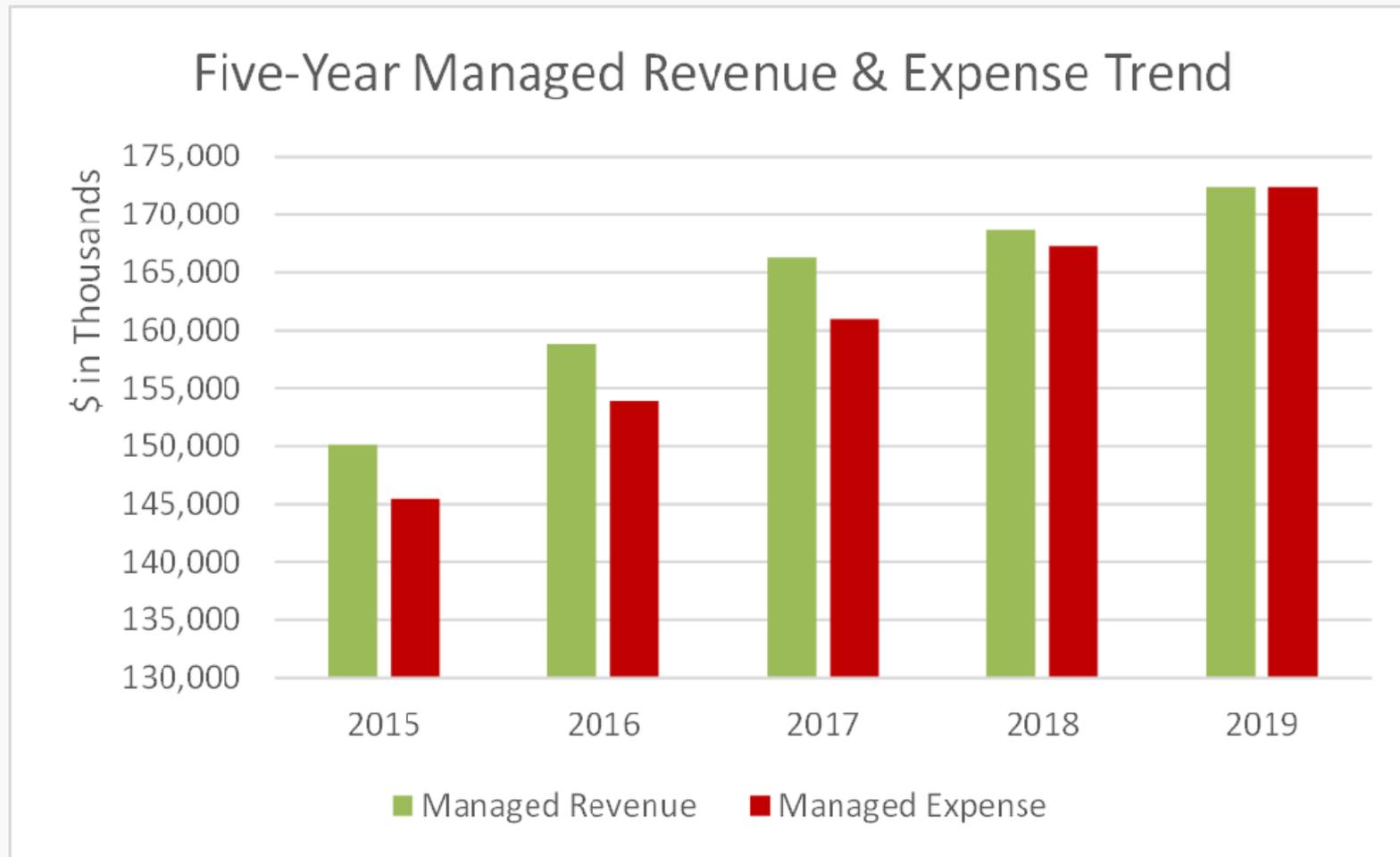
Enrollment Challenges

UG Day Credit Hours Fall to Fall - 2018 down 6.8%

Fall Enrollments as of May 11 of the Years as Shown



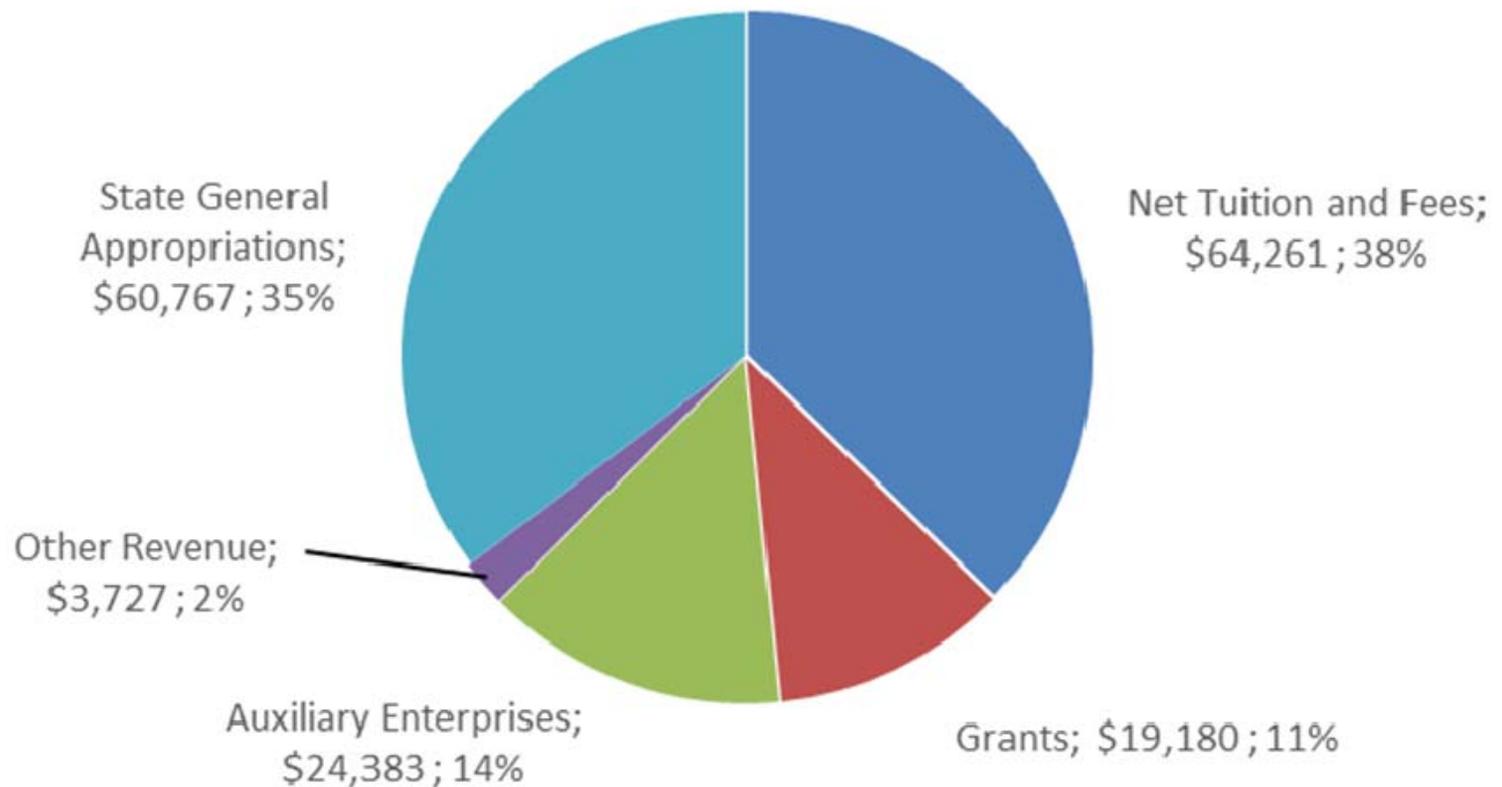
Recent Financial Trends



Non-cash revenue & expense, such as depreciation, state building grants, GASB pension & OPEB adjustments, non-realized gains/losses are excluded.

FY19 Managed Revenue by Source

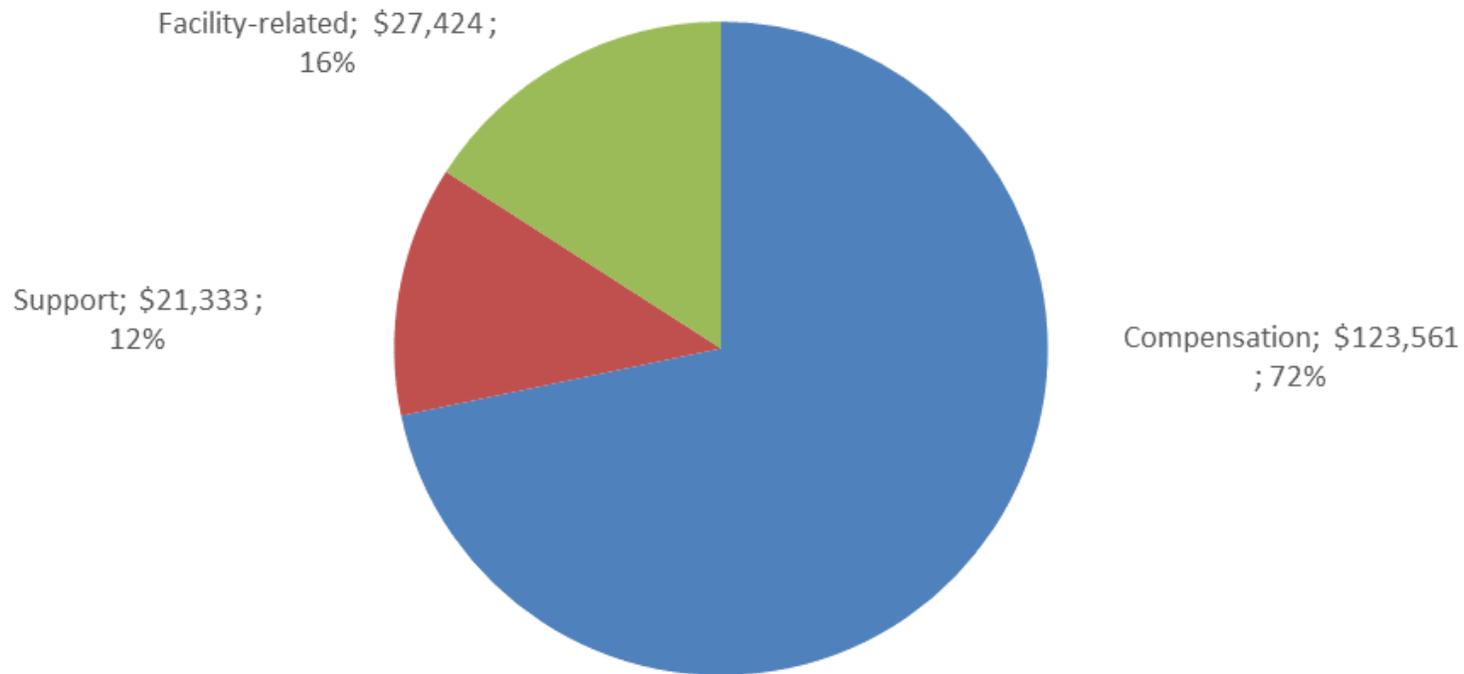
FY 2019 Managed Revenue Budget (\$ in thousands)



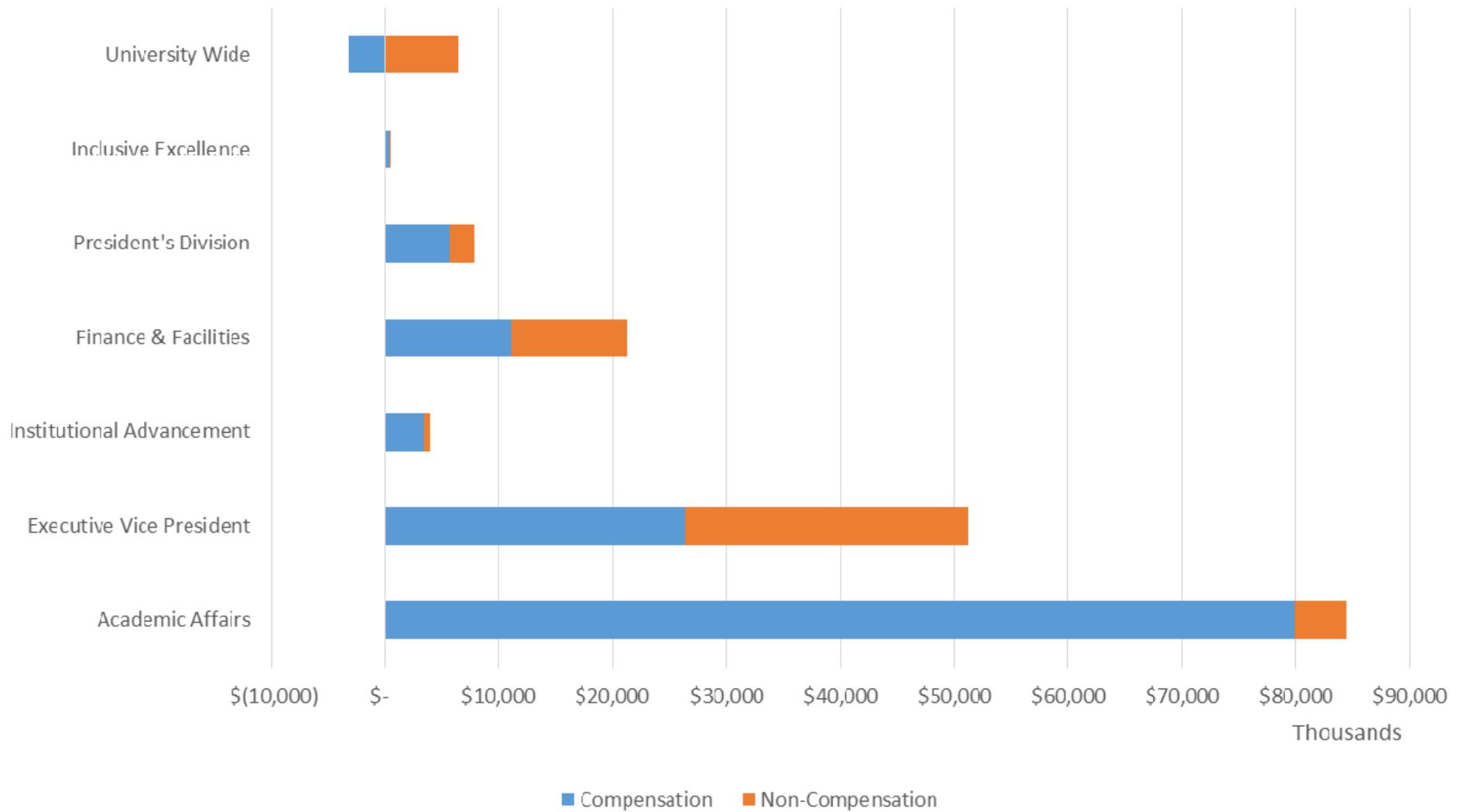
FY19 Managed Expenses by Type

Includes \$5M vacancy target ~ hiring freeze

FY 2019 Managed Expense Budget



FY2019 Expense Budget by Division



Budget uncertainties

- State budget not final
- Science Teaching Lab Addition – not included
- Enrollment
- Tuition & fee rates
- Union contracts
 - MSCA Day & APA – ratified but not yet funded. Equivalencies costly.
 - MSCA DGCE & AFSCME – not settled.
 - State appropriation assumed to cover year 1.



FY 2019 Fee Rates

Overview

The university presents a recommendation and attachment which includes a schedule of all tuition and fee rates proposed for FY 2019. Differing parties are authorized to recommend and/or establish rates (including the Commonwealth's Board of Higher Education, MSCBA, the Board of Trustees, and university administration.)

Tuition and mandatory fees are proposed to increase by \$606.90 or 5.9% for in-state undergraduate commuting students and \$933.42 or 5.6% for out-of-state undergraduate commuting students. Inclusive of room and board, total price of attendance for full time in-state undergraduate students would increase by 5% or \$1,118.90 per year and by 5% or \$1,445.42 per year for out-of-state students.

Previously, the Salem State University Board of Trustees approved tuition and fee rates for Graduate and Continuing Education programs for FY 2019 on April 11, 2018. Those rates are included in the package for completeness.

University Fee

The university needs to raise revenue from the university fee in order to address realistic expense budget items over which it has limited control. The university proposes to increase the University Fee rate for undergraduate students by \$581.80 or 6.5% over FY 2018. At the time of recommending the university's FY 2019 budget, the Commonwealth has not completed its budget process. The budget assumes the Commonwealth's appropriation is at the level recommended by the Governor and the House, which is flat as compared to FY18. In addition, the budget assumes the Commonwealth funds the first year of collective bargaining agreements for those unit employees whose salary is covered by the appropriation (approximately 60% of our benefitted labor salary budget.)

Capital Improvement Fee

The university recommends a 7% increase in the capital improvement fee, to \$15.45 per credit or \$370.80 per year per full-time undergraduate student. This is a small step to provide funding for maintenance and repair of facilities, much-needed as shown by the Sightlines deferred maintenance study.

Differential Fees

There are no changes to the differential fee rates for new enrollees. These differential rates are shown within the schedule of tuition and fee rates.

Online Course Fee

The university recommends no changes to the online course fee which is currently \$50 per credit charge for students who elect to take undergraduate courses in an on-line format.

For Full-time Undergraduate Students, a Comparison of the Current Year and Proposed Rates for the Next Year Is Below

FT Undergraduate - In-state	Actual FY18	Proposed FY19	Amount Increase	% Increase
Tuition	910.00	910.00	-	0.0%
University Fee	8,921.00	9,502.80	581.80	6.5%
Tuition and University Fee Only	9,831.00	10,412.80	581.80	5.9%
Capital Improvement Fee	346.50	370.80	24.30	7.0%
SGA Fee	100.00	100.80	0.80	0.8%
Total Tuition and Fees	10,277.50	10,884.40	606.90	5.9%
Room	8,520.00	8,950.00	430.00	5.0%
Board	3,690.00	3,772.00	82.00	2.2%
Total Tuition and Fees, Room and Board	22,487.50	23,606.40	1,118.90	5.0%
Note: Room is assumed to be at the Peabody Hall/Bowditch Hall rate; Board is assumed to be at the 14-Meal Plan rate.				

FT Undergraduate - Out-of state	Actual FY18	Proposed FY19	Amount Increase	% Increase
Tuition	7,050.00	7,050.00	-	0.0%
University Fee	9,209.28	10,118.40	909.12	9.9%
Tuition and University Fee Only	16,259.28	17,168.40	909.12	5.6%
Capital Improvement Fee	346.50	370.80	24.30	7.0%
SGA Fee	100.00	100.80	0.80	0.8%
Total Tuition and Fees	16,705.78	17,640.00	934.22	5.6%
Room	8,520.00	8,950.00	430.00	5.0%
Board	3,690.00	3,772.00	82.00	2.2%
Total Tuition and Fees, Room and Board	28,915.78	30,362.00	1,446.22	5.0%
Note: Room is assumed to be at the Peabody Hall/Bowditch Hall rate; Board is assumed to be at the 14-Meal Plan rate.				

REQUEST FOR TRUSTEE ACTION

Date: May 16, 2018
To: Board of Trustees
From: Karen P. House, Vice President for Finance and Facilities
Subject: FY 2019 University Fees
Requested Action: Approval

MOTION

The Finance and Facilities Committee hereby recommends that the Board of Trustees approve the following motion pertaining to fees for FY 2019.

Recommended motion

The Board of Trustees of Salem State University hereby approves the fees as shown in the attached tuition and fee rate schedule (Appendix IV). The new rates shall be effective for the 2018-19 academic year (FY 2019). The president and other officers of the university are hereby authorized to do all things and take all actions deemed necessary to implement this decision.

Committee Assigned: Finance & Facilities
Committee Action: Approved
Date of Action: May 23, 2018

Trustee Action:
Trustee Approval Date:
Effective Date:

Signed: _____
Title: _____
Date: _____



**Schedule of Student Charges
2018-19 Academic Year**

IN-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Day Undergraduate					
Tuition					
In-State	\$37.92	\$455.00	\$37.92	\$455.00	\$910.00
Fees					
University Fee ¹	\$395.95	\$4,751.40	\$395.95	\$4,751.40	\$9,502.80
Capital Improvement Fee	\$15.45	\$185.40	\$15.45	\$185.40	\$370.80
SGA Fee	\$4.20	\$50.40	\$4.20	\$50.40	\$100.80
Total Tuition and Fees					
In-State	\$453.52	\$5,442.20	\$453.52	\$5,442.20	\$10,884.40
Evening Undergraduate (SCPS)					
Tuition					
In-State	\$115.00		\$115.00		
Fees					
Course Fee	\$257.20		\$257.20		
Capital Improvement Fee	\$15.75		\$15.75		
SGA Fee	\$4.20		\$4.20		
Total Tuition and Fees					
In-State	\$392.15		\$392.15		
Graduate - Price Group 1					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$261.95		\$261.95		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$417.70		\$417.70		
Graduate - Price Group 2					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$301.35		\$301.35		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$457.10		\$457.10		
Graduate - Price Group 3					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$334.05		\$334.05		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$489.80		\$489.80		

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

IN-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Housing ²					
Peabody Hall/Bowditch Hall		\$4,475.00		\$4,475.00	\$8,950.00
Marsh Hall		\$4,982.50		\$4,982.50	\$9,965.00
Bates Complex - Double		\$5,050.00		\$5,050.00	\$10,100.00
Bates Complex - Single		\$5,435.00		\$5,435.00	\$10,870.00
Atlantic Hall - Double		\$5,527.50		\$5,527.50	\$11,055.00
Atlantic Hall - Single		\$6,165.00		\$6,165.00	\$12,330.00
Viking Hall - Double		\$5,092.50		\$5,092.50	\$10,185.00
Viking Hall - Single		\$5,397.50		\$5,397.50	\$10,795.00
Viking Hall - Double Suite		\$5,202.50		\$5,202.50	\$10,405.00
Viking Hall - Single Suite		\$5,507.50		\$5,507.50	\$11,015.00
Meal Plans					
Commuter Meal Plan ³		\$399.00		\$399.00	\$798.00
Resident Meal Plan ⁴		\$399.00		\$399.00	\$798.00
10-Meal Plan		\$1,738.00		\$1,738.00	\$3,476.00
14-Meal Plan ⁵		\$1,886.00		\$1,886.00	\$3,772.00
19-Meal Plan		\$1,973.00		\$1,973.00	\$3,946.00
Miscellaneous Fees					
Mass PIRG Fee (waivable each semester) ⁶		\$10.00		\$10.00	\$20.00
Resident Parking (Atlantic and Peabody lots)		\$275.00		\$275.00	\$550.00
Resident Parking (Bates lot)		\$250.00		\$250.00	\$500.00
Resident Parking (Marsh lot)		\$200.00		\$200.00	\$400.00
Commuter Parking		\$82.50		\$82.50	\$165.00
International Student Fee ⁷		\$375.00		\$375.00	\$750.00
Records Fee-for non-matriculated students		\$10.00		\$10.00	\$20.00

Online courses (undergraduate) per credit ⁸					\$50.00
Health Insurance -- (waivable) ⁹					\$2,985.00
Matriculation Fee -- new matriculated students (one-time)					\$250.00
Differential Fees for Undergraduate Programs					
Art ¹¹		\$125.00		\$125.00	\$250.00
Biology ¹⁰		\$250.00		\$250.00	\$500.00
Chemistry ¹¹		\$250.00		\$250.00	\$500.00
Communications ¹¹		\$125.00		\$125.00	\$250.00
Computer Science ¹¹		\$250.00		\$250.00	\$500.00
Dance ¹¹		\$125.00		\$125.00	\$250.00
Education ¹⁰		\$125.00		\$125.00	\$250.00
Geography (including Cartography) ¹¹		\$250.00		\$250.00	\$500.00
Geology ¹¹		\$250.00		\$250.00	\$500.00
Music ¹¹		\$125.00		\$125.00	\$250.00
Nursing ¹⁰		\$500.00		\$500.00	\$1,000.00
Social Work ¹⁰		\$125.00		\$125.00	\$250.00
Theatre (BA and BFA) ¹¹		\$125.00		\$125.00	\$250.00
Cohort Based Program Cost					
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2017 Cohort per credit ¹²					\$470.00
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2018 Cohort per credit ¹²					\$525.00

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

NOTES:

- 1 The University Fee represents the fee anticipated for 2018-19. Fees may change by action of the Board of Trustees.
- 2 Housing rates include (1) \$20 per semester/\$40 per year Residence Hall Association Fee for all residence halls; and (2) \$305 per semester/\$610 per year Technology/Student Fee for Bates (Double); \$362.50 per semester/\$725 per year Technology/Student Fee for Atlantic Hall (double), Marsh Hall and Viking Hall; \$400 per semester/\$800 per year Technology/Student Service Fee for Bowditch, Peabody, Bates (Single) and Atlantic Hall (Single).
- 3 Charged to all commuter students. Required for all first-year students in first two semesters of attendance; waivable for other students. Includes \$302 dining dollars and \$97 ClipperCash per semester.
- 4 Minimum required for residents of Atlantic Hall and Bates. Includes \$302 dining dollars and \$97 Clipper Cash per semester.
- 5 Minimum required for residents of Peabody, Bowditch, Marsh & Viking Halls. All plans include \$97 ClipperCash per semester 10-meal and 14-meal plans include \$200 Dining Dollars; 19-meal plan includes \$100 Dining Dollars.
- 6 Charged for all day students each semester. Student may opt out and have fee waived on line.
- 7 Applicable to all matriculated international students with a Salem State-issued visa (excluding ESL students)
- 8 All undergraduate students taking online courses to be charged \$50 per credit
- 9 Charged for all students enrolled in at least 75 percent of a full-time course load. Student may opt out and have fee waived if covered by other health insurance. Fall only prorated charge is \$1,253 and spring only prorated charge is \$1,748.
- 10 Annual additional fees applicable beginning with academic year 2016-17 entrants to the program (incoming or transfers).
- 11 Annual additional fees applicable beginning with academic year 2017-18 new entrants to the program (incoming or transfers)
- 12 Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) is a cohort based program with a charge of \$470 per credit for Summer 2017 entrants. Summer 2018 entering cohort will be \$525 per credit.

All charges are subject to change.



**Schedule of Student Charges
2018-19 Academic Year**

OUT-OF-STATE	Fall 2018		Spring 2019		Academic Year
	Per Credit	Full-Time	Per Credit	Full-Time	Full-Time
Day Undergraduate					
Tuition					
Out-of-State	\$293.75	\$3,525.00	\$293.75	\$3,525.00	\$7,050.00
Fees					
University Fee ¹	\$421.60	\$5,059.20	\$421.60	\$5,059.20	\$10,118.40
Capital Improvement Fee	\$15.45	\$185.40	\$15.45	\$185.40	\$370.80
SGA Fee	\$4.20	\$50.40	\$4.20	\$50.40	\$100.80
Total Tuition and Fees					
Out-of-State	\$735.00	\$8,820.00	\$735.00	\$8,820.00	\$17,640.00

Evening Undergraduate (SCPS)					
Tuition					
Out-of-State	\$285.00		\$285.00		
Fees					
Course Fee	\$257.20		\$257.20		
Capital Improvement Fee	\$15.75		\$15.75		
SGA Fee	\$4.20		\$4.20		
Total Tuition and Fees					
Out-of-State	\$562.15		\$562.15		

(1) International Students - Supplemental Charge - \$140 per credit

Graduate- Price Group 1					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$261.95		\$261.95		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$507.70		\$507.70		

Graduate - Price Group 2					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$301.35		\$301.35		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$547.10		\$547.10		

Graduate - Price Group 3					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$334.05		\$334.05		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$579.80		\$579.80		

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

OUT-OF-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Housing ²					
Peabody Hall/Bowditch Hall		\$4,475.00		\$4,475.00	\$8,950.00
Marsh Hall		\$4,982.50		\$4,982.50	\$9,965.00
Bates Complex - Double		\$5,050.00		\$5,050.00	\$10,100.00
Bates Complex - Single		\$5,435.00		\$5,435.00	\$10,870.00
Atlantic Hall - Double		\$5,527.50		\$5,527.50	\$11,055.00
Atlantic Hall - Single		\$6,165.00		\$6,165.00	\$12,330.00
Viking Hall - Double		\$5,092.50		\$5,092.50	\$10,185.00
Viking Hall - Single		\$5,397.50		\$5,397.50	\$10,795.00
Viking Hall - Double Suite		\$5,202.50		\$5,202.50	\$10,405.00
Viking Hall - Single Suite		\$5,507.50		\$5,507.50	\$11,015.00
Meal Plans					
Commuter Meal Plan ³		\$399.00		\$399.00	\$798.00
Resident Meal Plan ⁴		\$399.00		\$399.00	\$798.00
10-Meal Plan		\$1,738.00		\$1,738.00	\$3,476.00
14-Meal Plan ⁵		\$1,886.00		\$1,886.00	\$3,772.00
19-Meal Plan		\$1,973.00		\$1,973.00	\$3,946.00
Miscellaneous Fees					
Mass PIRG Fee (waivable each semester) ⁶		\$10.00		\$10.00	\$20.00
Resident Parking (Atlantic and Peabody lots)		\$275.00		\$275.00	\$550.00
Resident Parking (Bates lot)		\$250.00		\$250.00	\$500.00
Resident Parking (Marsh lot)		\$200.00		\$200.00	\$400.00
Commuter Parking		\$82.50		\$82.50	\$165.00
International Student Fee ⁷		\$375.00		\$375.00	\$750.00
Records Fee-for non-matriculated students		\$10.00		\$10.00	\$20.00

Online courses (undergraduate) per credit ⁸					\$50.00
Health Insurance -- (waivable) ⁹					\$2,985.00
Matriculation Fee -- new matriculated students (one-time)					\$250.00
Differential Fees for Undergraduate Programs					
Art ¹¹		\$125.00		\$125.00	\$250.00
Biology ¹⁰		\$250.00		\$250.00	\$500.00
Chemistry ¹¹		\$250.00		\$250.00	\$500.00
Communications ¹¹		\$125.00		\$125.00	\$250.00
Computer Science ¹¹		\$250.00		\$250.00	\$500.00
Dance ¹¹		\$125.00		\$125.00	\$250.00
Education ¹⁰		\$125.00		\$125.00	\$250.00
Geography (including Cartography) ¹¹		\$250.00		\$250.00	\$500.00
Geology ¹¹		\$250.00		\$250.00	\$500.00
Music ¹¹		\$125.00		\$125.00	\$250.00
Nursing ¹⁰		\$500.00		\$500.00	\$1,000.00
Social Work ¹⁰		\$125.00		\$125.00	\$250.00
Theatre (BA and BFA) ¹¹		\$125.00		\$125.00	\$250.00
Cohort Based Program Cost					
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2017 Cohort per credit ¹²					\$470.00
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2018 Cohort per credit ¹²					\$525.00

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

NOTES:

- 1 The University Fee represents the fee anticipated for 2018-19. Fees may change by action of the Board of Trustees.
- 2 Housing rates include (1) \$20 per semester/\$40 per year Residence Hall Association Fee for all residence halls; and (2) \$305 per semester/\$610 per year Technology/Student Fee for Bates (Double); \$362.50 per semester/\$725 per year Technology/Student Fee for Atlantic Hall (double), Marsh Hall and Viking Hall; \$400 per semester/\$800 per year Technology/Student Service Fee for Bowditch, Peabody, Bates (Single) and Atlantic Hall (Single).
- 3 Charged to all commuter students. Required for all first-year students in first two semesters of attendance; waivable for other students. Includes \$302 dining dollars and \$97 ClipperCash per semester.
- 4 Minimum required for residents of Atlantic Hall and Bates. Includes \$302 dining dollars and \$97 Clipper Cash per semester.
- 5 Minimum required for residents of Peabody, Bowditch, Marsh & Viking Halls. All plans include \$97 ClipperCash per semester 10-meal and 14-meal plans include \$200 Dining Dollars; 19-meal plan includes \$100 Dining Dollars.
- 6 Charged for all day students each semester. Student may opt out and have fee waived on line.
- 7 Applicable to all matriculated international students with a Salem State-issued visa (excluding ESL students)
- 8 All undergraduate students taking online courses to be charged \$50 per credit
- 9 Charged for all students enrolled in at least 75 percent of a full-time course load. Student may opt out and have fee waived if covered by other health insurance. Fall only prorated charge is \$1,253 and spring only prorated charge is \$1,748.
- 10 Annual additional fees applicable beginning with academic year 2016-17 entrants to the program (incoming or transfers).
- 11 Annual additional fees applicable beginning with academic year 2017-18 new entrants to the program (incoming or transfers)
- 12 Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) is a cohort based program with a charge of \$470 per credit for Summer 2017 entrants. Summer 2018 entering cohort will be \$525 per credit.

All charges are subject to change.

Fees below pertain to those courses offered by the School of Continuing and Professional Studies and School of Graduate Studies

Course fees	Range
Lab fees	\$25 - \$500 per course
Clinical Fees	\$15 - \$100 per course
Nursing Resource Center Fee	\$100 per course
Field Placement Fee for MSW courses (currently)	\$100 - \$250 per course
Institute Fee	\$100 per institute

Below are miscellaneous fees and fines that pertain to specific situations as noted**Application Fees**

Undergraduate Admissions	\$50
Graduate Admissions	\$50/online/\$100 paper
Comprehensive Exam Application-Graduate School	\$50

Parking fines

Various violations	\$25 - \$125 per violation
Violation Appeal Fee if appeal not granted	\$5 per violation

Late fees

Late application for degree (undergraduate and graduate)	\$50
Late payment (tuition and fees)	\$50/month
Payment plans (enrollment fee from TMS)	\$40/semester
Non-credit course fee	varies depending on course
Institutes (wintersession/summer)	varies depending on course

**Salem State University
FY 2019 Tuition and Fees
Graduate**

<u>Approved (AY 2019)</u>	
GRADUATE	
Price Group 1	3% Course Fee increase
Massachusetts Residents	
Per Credit	\$417.70
Per Course (3 credits)	\$1,253.10
Out of State Residents	
Per Credit	\$507.70
Per Course (3 credits)	\$1,523.10
International Student Fee Charge (per semester)	\$375.00
Price Group 2	6% Course Fee increase
Massachusetts Residents	
Per Credit	\$457.10
Per Course (3 credits)	\$1,371.30
Out of State Residents	
Per Credit	\$547.10
Per Course (3 credits)	\$1,641.30
International Student Fee Charge (per semester)	\$375.00
Price Group 3	8% Course Fee increase
Massachusetts Residents	
Per Credit	\$489.80
Per Course (3 credits)	\$1,469.40
Out of State Residents	
Per Credit	\$579.80
Per Course (3 credits)	\$1,739.40
International Student Fee Charge (per semester)	\$375.00

Note: The rates above include Tuition, Course Fee, and Capital Improvement Fee.

**Salem State University
FY 2019 Tuition and Fees
Continuing Education**

	<u>Current (AY 2018)</u>	<u>Proposed (AY 2019)</u>
Continuing Education		
Fall and Spring		4% Course Fee increase
Massachusetts Residents		
Per Credit	\$381.17	\$392.15
Per Course (3 credits)	\$1,143.51	\$1,176.45
Out of State Residents		
Per Credit	\$551.17	\$562.15
Per Course (3 credits)	\$1,653.51	\$1,686.45
International Student Supplemental Charge (per credit)	\$140.00	\$140.00
	<u>Summer 2018</u>	<u>Summer 2019</u>
Summer		4% Course Fee increase
Massachusetts Residents		
Per Credit	\$318.00	\$327.35
Per Course (3 credits)	\$954.00	\$982.05
Out of State Residents		
Per Credit	\$453.00	\$462.35
Per Course (3 credits)	\$1,359.00	\$1,387.05
International Student Supplemental Charge (per credit)	\$140.00	\$140.00

Note 1: The rates above for Fall and Spring include Tuition, Course Fee, Capital Improvement Fee, and SGA Fee.

Note 2: The rates above for Summer include Tuition, Course Fee, and Capital Improvement Fee.

**Salem State University
Graduate Price Groups**

Program
Price Group 1
Master's Programs
English (MA)
History (MA)
Education - Master's Programs
Art (MAT)
Chemistry (MAT)
Early Childhood Education (MEd)
Elementary Education (MEd)
English (MA/MAT)
English (MAT)
English to Speakers of Other Languages (ESOL) (MAT)
History (MAT)
Leadership in Physical Education & Movement Studies (MEd)
Library Media Studies (MEd)
Mathematics (MAT)
Middle School Education (MEd)
Middle School Math (MAT)
Physical Education (MAT)
Reading (MEd)
Secondary Education (MEd)
Spanish (MAT)
Special Education (MEd)
Education - Licensure Only Programs
Early Childhood Education
Elementary Education
English to Speakers of Other Languages (ESOL)
Mathematics
Middle School Education (Initial Licensure Only)
Reading
Special Education
Graduate Certificate Programs
Autism Spectrum Disorders
Digital Studies
Global Policy Analysis
Holocaust and Genocide Studies
Public History
Public Policy and Administration
Strategic Communications
Teaching English to Speakers of Other Languages
Writing and Rhetoric Studies
Teacher Leadership
Certificate of Advanced Graduate Study (CAGS)
Educational Leadership

Program
Price Group 2
Master's Programs
Behavior Analysis (MS)
Counseling (MS)
Criminal Justice (MS)
Geo-Information Science (MS)
Industrial/Organizational Psychology (MS)
Mathematics (MS)
Social Work (MSW)
Education - Master's Programs
Higher Education in Student Affairs (MEd)
School Counseling (MEd)
Education - Licensure Only Programs
School Adjustment Counselor (Initial Licensure Only)
School Counseling
Graduate Certificate Programs
Applied Behavior Analysis
Clinical Trial Management
Computer Science
Counseling
Geo-Information Science
Sport Development and Management
Price Group 3
Master's Programs
Accounting (MS)
Business Administration (MBA)
Nursing (MSN)
Occupational Therapy – Direct Entry (MS)
Occupational Therapy (MS)
Graduate Certificate Programs
Business
Financial Planning
Nursing Education

REQUEST FOR TRUSTEE ACTION

Date: May 23, 2018
To: Board of Trustees
From: Finance & Facilities Committee
Subject: FY 2019 All Funds Budget
Requested Action: Approval

The Board of Trustees must approve an all funds budget for the coming fiscal year which begins on July 1, to provide for the operation of the university. Should the state appropriation or other assumptions differ materially from the estimates, a recommended revised budget will be brought forward to the board to consider in the fall. Fee rates are recommended to the Board in a separate motion and incorporated in the budgeted revenue figures. The approval of the budget includes approval for each separate trust fund as shown on the FY 2019 Trust Fund Budgets schedule included in the budget package.

MOTION

The Finance and Facilities Committee hereby recommends that the Board of Trustees approve the following motion pertaining to the attached FY 2019 Salem State University All Funds Budget.

Recommended motion

The Board of Trustees of Salem State University hereby approves the Fiscal Year 2019 All Funds Budget as recommended by the president and as shown in the attached FY 2019 Salem State University All Funds Budget at the level of \$172.3 million in Managed Expenses. This action includes approval of the FY 2019 Trust Fund Budgets and the Contracts Exceeding \$500,000 each as included in the budget package. The president and other officers of the university are hereby authorized to do all things and take all actions deemed necessary to implement this decision.

Committee Assigned: Finance & Facilities
Committee Action: Approved
Date of Action: May 23, 2018

Trustee Action:
Trustee Approval Date:
Effective Date:

Signed: _____
Title: Secretary, Board of Trustees
Date: _____

FY 2019 Salem State University All Funds Budget

“Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society, and serve as a resource to advance the region's cultural, social and economic development.”



Budget Approach

Salem State University presents an All Funds Budget in a Management Report format that separates Managed Revenues, Expenses, and Net Income from Non-Cash Revenue and Expense activity. For completed years, the bottom line agrees to the audited financial statement presentation. Certain non-cash items are not controllable or predictable by the university and are therefore budgeted at zero. Refer to “Composition of the Budget and Relationship to Generally Accepted Accounting Principles (GAAP)” for further information.

Trust Funds

Appendix I is a matrix to assist the reader to understand the definition of each Trust Fund. In accordance with the university's [Trust Fund Guidelines](#) approved by the Board of Trustees in June 2016 and revised in October 2017, the Trust Funds Budget displays the budgeted revenues, expenses, and changes in net position for each of the official Trust Funds in a columnar format (see Exhibit 2).

Budget Overview

Salem State University presents its Fiscal Year 2019 All Funds Budget with Managed Revenues of \$172.3 million and Managed Expenses of \$172.3 million (see Exhibit 1). The budget relies on assumptions regarding all activities as of mid May 2018 which is especially relevant for student enrollment, tuition and fee rates, state appropriation and collective bargaining agreements (none of which are yet final). Non-cash revenues and expenses, primarily depreciation, is projected to reduce overall GAAP basis Net Position by \$9.3 million.

Key Elements of the Budget are Summarized Below

	FY 2018	FY 2019	FY 18 Change	FY 18 Change
	Projected	Budget	Amount	%
Key Assumptions, FY 2019 Budget				
Revenue: Price & Enrollment				
In-state, commuter (rate)	\$10,278	\$10,884	\$607	5.9%
Out-of-state, commuter (rate)	\$16,706	\$17,640	\$934	5.6%
Undergraduate Day Enrollment (Headcount - average Fall and Spring)	6,345	5,755	(590)	-9.3%
Tuition & Fee Revenue (\$M, net of financial aid (contra-rev & exp.))	\$63.539	\$64.261	\$0.722	1.1%
State Support				
State Appropriation (\$M, GAA + CBA + Formula Funding)	\$45.324	\$45.724	\$0.400	0.9%
State Capital Grant (\$M, non-cash revenue: Sophia Gordon Center)	\$3.400	\$0.000	(\$3.400)	-100.0%
Compensation				
Salary & Wages (\$M, Benefitted workforce)	\$74.101	\$73.707	(\$0.395)	-0.5%
Fringe Benefits Expense (\$M)	\$28.045	\$28.791	\$0.746	2.7%
Benefits Rates, incl. taxes	36.33%	37.14%	0.81%	2.2%
Facilities Related Expenses				
Utilities Expense (\$M)	\$4.000	\$4.208	\$0.208	5.2%
Debt Service Expense (\$M, Assessment + Interest Expense)	\$16.256	\$16.875	\$0.619	3.8%
Depreciation & Amortization (\$M, non-cash expense)	\$9.326	\$9.183	(\$0.143)	-1.5%
Major Capital Projects	none	none	none	none
Managed Net Income (\$M)	\$1.357	\$0.000	(\$1.357)	-100.0%
Overall Add to (Use of) Net Position (\$M)	(\$8.467)	(\$9.319)	(\$0.852)	10.1%

Enrollment Challenges

At the time of finalizing the budget, the university was short of its planned undergraduate day student enrollment target by approximately 460 students, a combination of lower than planned entering freshmen/transfers and a sizable reduction of returning students when compared to the prior year at the same point. Outreach and recruitment activities are underway and this number will fluctuate until the opening of the Fall semester. The enrollment shortfall resulted in a number of recent changes to the

budget including a significant reduction of budgeted revenues, selective reduction of non-compensation items, and the imposition of a hiring freeze effective May 8, 2018 in order to control compensation to a budget target. The university will continue increasing its investment in financial aid and marketing. In addition, Salem State will launch new academic programs such as a Master of Science in Accounting, MS in Athletic Training, and BS in IT to increase its offerings to a changing marketplace that includes declines in college-going age students. The university is advocating for legislative approval of offering clinical doctorates, given the strength of our programs in Occupational Therapy. Despite the pressures on undergraduate and continuing education enrollment totals, the university takes pride in the gains made towards the Massachusetts Department of Higher Education (DHE) system goals of college participation, college completion and closing achievement gaps.

Uncertainties

With input from a variety of sources, the effort to develop the FY 2019 All Funds Budget was significant. However, the following uncertainties are acknowledged:

- The Commonwealth's budget process is not expected to be complete until summer 2018. It is not certain how much the university will receive in FY 2019 base appropriation, formula (performance) funding, funding for the first year of new union contracts, or other financial support from the Commonwealth (state grants). The Governor and the House Ways and Means included \$44.444 million for the university in their proposed base operating appropriations for FY19. This is the same as was appropriated for FY18.
- The university is awaiting a decision from the Commonwealth regarding funding to build a Science Teaching Lab Addition. The university has not included state grant revenue nor spending from its own funds for this facility in the FY19 budget.
- While the Enrollment Management and Schools of Graduate Studies and Continuing and Professional Studies (DGCE) teams have worked hard to recruit students, any further change in undergraduate day enrollment or credit hour enrollment of DGCE students would impact revenue.
- Proposed tuition and fee rates incorporated in the development of the budget are being presented to the Finance and Facilities Committee and Board of Trustees concurrent with the budget (see Appendix IV) and are not yet approved.
- Approximately 93% of the full-time workforce is unionized. The contracts have all expired and were under negotiation for much of FY18. The Association of Professional Administrators (APA) contract expired on December 31, 2016; negotiations have concluded and the union ratified a new contract on May 10, 2018. The Massachusetts State College Association (MSCA) Day contract expired on June 30, 2017. A new contract has been negotiated and was ratified by the union on May 8-9, 2018. Both of these contracts await the formal state approval and funding process. The MSCA (DGCE) and the AFSCME contracts are not settled. A salary increase assumption has been used for budgeting purposes based on the financial bargaining parameters. The budget assumes the Commonwealth will fund the first year of the new labor contracts and that funding will roll into the base appropriation (General Appropriations Act).

- There is no provision for Governmental Accounting Standards Board (GASB) 68 or GASB 75 non-cash expenses included in the FY 2019 budget. Actual amounts will be provided by the Commonwealth as FY19 is being closed.

University Leadership

John D. Keenan began service as the university's 14th president on August 6, 2017. In a bold speech commemorating his formal inauguration on January 19, 2018, President Keenan laid out a clear vision for a thriving campus based on academic excellence, student success, and capital improvements. <https://www.salemstate.edu/news/president-john-d-keenans-inaugural-address> President Keenan's earliest priority has been accomplished: finalize the strategic plan and receive approval of it from the Board of Trustees and the Board of Higher Education (November 2017). With the selection and installation of a new president and the adoption of a new strategic plan, attention of the campus has turned toward detailed action steps and implementation. By May 2018, earliest strategies and action steps have been identified, quantified, and included as appropriate in the FY19 budget and the Multi Year Financial Projection (MYFP). As additional action steps are brought into focus that take into account the May 2018 enrollment shortfall, these, too will be quantified and included in the next update of the MYFP.

Strategic Plan

Developed through an inclusive and collaborative process, the four strategic goals of the university's plan are identified below. In addition, several other planning efforts have been underway, including enrollment and marketing planning, a financial aid leveraging study, academic program net revenue analysis, and evaluation of opportunities to expand on-line or hybrid delivery options. These studies will culminate in purposeful action steps to ensure the quality of programs, success of students, and vitality of the university's finances in the long run. Overarching goals of the strategic plan include:

Financial Vitality: Strengthen Salem State's financial foundation, align resources with priorities, and foster innovation to drive new revenue streams. Identify and implement additional opportunities to contain, reduce, or avoid future growth in costs. We must continue to work towards establishing a stronger financial base, by strategically growing enrollment, diversifying program delivery, and generating new sources of revenue. Current Business Intelligence efforts will provide the roadmap.

Collaboration, Inclusion and Stewardship: Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship. The pace of change in higher education requires a coordinated, committed and collaborative process of relationship- and trust-building among faculty, staff, students and external partners. The Campus Climate Study results will help guide us.

Academic Excellence: Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society. Our continued successes in academic excellence require support for faculty development in aid of pedagogical and curricular innovation (including alternative modes of course delivery), as well as greater connection to regional opportunities for experiential learning, continuing scholarship, and civic engagement.

Student Success: Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals. We aim to foster a supportive environment for student growth in the context of the North Shore's shifting demographics and evolving economic trends, with an eye toward providing nimbler responses to the needs of our students and their future employers.

Implementation of these goals will lead to success in the following areas:

- BHE "Big Three" (participation, completion, and closing achievement gaps)
- Inclusive Excellence
- Science & Healthcare on a Liberal Arts Foundation
- Place
- Civic Responsibility

Capital Planning

Science Teaching Lab Addition: As one of the university's highest priorities the Science Teaching Laboratory Addition is needed to meet student and industry demand for science and healthcare degrees and credentials. Construction of the proposed Science Teaching Laboratory Addition will serve the ever-increasing population of regional students seeking biology, chemistry, nursing and healthcare degrees. Our highest demand program is nursing, and Salem State's other health programs are important workforce growth areas that are experiencing increasing student interest. Biology and chemistry are strong and positioned for expansion. However, the university is lacking the laboratory facilities that meet current industry standards and accommodate this growth. Without increases in enrollment, the need to cover labor and facility-related expense growth with revenue growth places pressure on tuition and fees that is counter to our imperative to provide reasonable cost offerings to our students in fulfillment of our mission. The strategic plan for the STLA was submitted to DCAMM in December 2017 for review and consideration and the university is waiting to hear the outcome in May 2018.

Deferred Maintenance: In the fall of 2017 the university partnered with DCAMM and Sightlines to conduct a facilities condition assessment to identify maintenance needs, repair priority and estimated costs. Using their Building Portfolio Solutions methodology, Sightlines was able to provide information about campus maintenance needs and facilities benchmarking information using their Return on Physical Assets (ROPA+) methodology. This analysis enables DCAMM, MSCBA, and the university to identify strategies to address the deferred maintenance backlog (a ten year need of \$253M) and to optimize the limited available funding for deferred maintenance projects.

Multi Year Financial Projection (MYFP)

In FY 2017 the university developed its first-ever multi-year financial projection (MYFP). Planning assumptions, revenues, expenses, and cash flow projections have been rolled forward to encompass FY 2019 through FY 2022 in a baseline scenario; selected strategic initiatives were then layered into the MYFP to present an All-In view. For the baseline scenario the trend going forward indicates significant financial challenges. This is largely driven by declining enrollment, flat or modest state appropriation, and increasing compensation costs. The baseline serves as a motivating and informative tool which drives the campus to focus on those strategic initiatives and strategies which will change the financial trajectory. Primarily this means enrollment growth, although non-enrollment revenue generation is an

additional aid. President Kennan has established a goal of growing by 2000 students in ten years and plans are being developed to generate such growth.

Contracts Greater than \$500,000

In accordance with the Trust Fund Guidelines, the Board of Trustees must approve contracts greater than \$500,000 each and may do so in conjunction with approval of the budget. Appendix II provides a list of such contracts for FY 2019 for approval.

Composition of the Budget and Relationship to Generally Accepted Accounting Principles (GAAP)

Salem State University is in its third year of presenting an All Funds Budget. This means that all trust funds and fund types are included in the budget. Intentionally, the budget format is not the same as the GAAP format used in producing financial statements which are audited each year. The university's budget and quarterly management reports are presented in a summarized Managed Revenues and Expenses Report format which distinguishes between managed and non-cash revenue and expense activity. This Managed Revenues and Expenses format allows the reader to focus on the elements of the budget that university administration must control and manage and which impacts cash flows, while displaying the non-cash GAAP based revenue and expense items at the bottom. This approach enables the Managed Revenues and Expenses report to reconcile to GAAP-basis audited financial statements for completed years.

The Governmental Accounting Standards Board (GASB) has issued several new standards that are not reflected in the FY19 budget. The University is in the process of implementing GASB Statement No. 75, Accounting and Financial Reporting for Postemployment Benefits Other Than Pensions, in its FY18 financial statements. Consistent with its budgetary practice for GASB 68, Accounting and Financial Reporting for Pensions, the university will not have a reliable estimate for these non-cash expenses until information is received from the Commonwealth at the end of the fiscal year. Thus for budget purposes, the amount for GASB 68 and GASB 75 is shown as zero. The university anticipates future implementation of GASB 87, Leases, which is effective for periods beginning after December 15, 2019. There is nothing related to GASB 87 in the FY19 budget.

FY 2019 Budget Information

Refer to the [Exhibits](#) for the All Funds Budget and Trust Fund Budgets

Refer to the [Charts](#) for graphical depictions of revenues, expenses, and enrollment

Refer to the [Tables](#) for trends concerning the details of the budget

Refer to the [Appendices](#) for supporting materials:

- Appendix I – Trust Fund Matrix
- Appendix II – Contracts Estimated to Exceed \$500,000 Each in FY 2019 (approved with approval of the budget)
- Appendix III – Capital Projects
- Appendix IV – Tuition/Fee rates for FY 2019

Figures and amounts in the exhibits and tables may not total due to rounding.

Exhibit 1: Salem State University FY 2019 All Funds Budget

Account Description (\$ in thousands)	FY 2017 Year End Actuals	FY 2018 Year-to- Date April 2018 Actuals	FY 2018 Forecast as of 4/11/18	FY 2019 Original Budget
Managed Revenue				
Tuition and Fees	\$84,560	\$86,968	\$87,140	\$89,686
Less: Scholarships, Fellowships & Waivers	(23,321)	(23,954)	(23,600)	(25,424)
Net Tuition and Fees	61,239	63,014	63,539	64,261
Federal, State, Private Grants	19,306	18,544	18,613	19,180
Auxiliary Enterprises	22,519	22,851	23,199	24,383
State General Appropriations	58,768	50,281	59,898	60,767
Other Revenue	4,422	4,967	3,346	3,727
Total Managed Revenue	166,254	159,657	168,596	172,318
<i>Year over Year Change</i>			1.4%	2.2%
Managed Expenses				
Compensation	118,273	96,765	122,762	123,561
Support	17,991	14,303	18,393	21,303
Facility-related	24,669	23,960	26,083	27,454
Total Managed Expenses	160,934	135,028	167,239	172,318
<i>Year over Year Change</i>			3.9%	3.0%
Managed Net Income	5,320	24,629	1,357	0
Managed Cash Flow Ratio	3.2%	15.4%	0.8%	0.0%
Non-Cash Revenue / (Expenses)				
Capital Grants	7,711	0	3,400	0
Depreciation	(8,477)	(7,382)	(9,326)	(9,183)
Contributions to SSUAC	(896)	0	0	0
Unrealized Gains/Losses	738	(473)	(198)	(136)
GASB 68 Pension	(4,711)	0	(3,700)	0
Total Non-Cash Revenue / (Expenses)	(5,636)	(7,855)	(9,824)	(9,319)
<i>Year over Year Change</i>			74.3%	-5.1%
Total Increase / (Decrease) in Net Position	(316)	16,774	(8,467)	(9,319)

Exhibit 2: Salem State University FY 2019 Trust Fund Budget

Account Description (\$ in thousands)	Unrestricted Auxiliaries	Educational & General Funds	Grants	Gifts	Residence Halls	Restricted Other	Total Restricted Endowments	Net Invested in Capital Assets	FY 2019 Budget Total
Operating Revenue									
Net Tuition and Fees	\$0	\$82,290	(\$16,776)	(\$585)	(\$1,338)	\$671	\$0	\$0	\$64,261
Federal, State, Private Grants	0	0	19,180	0	0	0	0	0	19,180
Auxiliary Enterprises	3,284	439	0	0	20,535	125	0	0	24,383
State General Appropriations	0	60,767	0	0	0	0	0	0	60,767
Other Revenue	376	957	12	2,044	0	328	10	0	3,727
Total Managed Revenue	3,660	144,453	2,416	1,458	19,197	1,124	10	0	172,318
Managed Expenses									
Compensation	113	116,840	1,993	107	4,470	38	0	0	123,561
Support	188	18,577	423	751	367	998	0	0	21,303
Facility-related	3,208	11,908	0	600	14,400	89	0	(2,751)	27,454
Total Managed Expenses	3,509	147,325	2,416	1,458	19,237	1,124	0	(2,751)	172,318
Managed Net Income	151	(2,873)	0	0	(40)	0	10	2,751	0
Managed Cash Flow Ratio	4.1%	-2.0%	0.0%	0.0%	-0.2%	0.0%	100.0%	0.0%	0.0%
Non-Cash Revenue / (Expenses)									
Capital Grants	0	0	0	0	0	0	0	0	0
Depreciation	0	0	0	0	0	0	0	(9,183)	(9,183)
Contributions to SSUAC	0	0	0	0	0	0	0	0	0
Unrealized Gains/Losses	0	(136)	0	0	0	0	0	0	(136)
GASB 68 Pension	0	0	0	0	0	0	0	0	0
Total Non-Cash Revenue / (Expenses)	0	(136)	0	0	0	0	0	(9,183)	(9,319)
Total Increase/Decrease in Net Position	151	(3,008)	0	0	(40)	0	10	(6,432)	(9,319)

Exhibit 3: Five-Year Managed Revenue vs. Managed Expense Trend

Account Description (\$ in thousands)	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019
	Year End Actuals	Year End Actuals	Year End Actuals	Forecast as of 4/11/18	Original Budget
Managed Revenue					
Net Tuition and Fees	53,089	57,896	61,239	63,539	64,261
Federal, State, Private Grants	19,782	18,820	19,306	18,613	19,180
Auxiliary Enterprises	17,822	21,149	22,519	23,199	24,383
State General Appropriations	55,064	56,416	58,768	59,898	60,767
Other Revenue	4,365	4,593	4,422	3,346	3,727
Total Managed Revenue	150,122	158,874	166,254	168,596	172,318
<i>Year over Year Change</i>		5.8%	4.6%	1.4%	2.2%
Managed Expenses					
Compensation	107,510	112,436	118,273	122,762	123,561
Support	17,842	18,568	17,991	18,393	21,303
Facility-related	20,096	22,934	24,669	26,083	27,454
Total Managed Expenses	145,448	153,939	160,934	167,239	172,318
<i>Year over Year Change</i>		5.8%	4.5%	3.9%	3.0%
Managed Net Income	4,674	4,935	5,320	1,357	0

Chart 1: Five-Year Managed Revenue vs. Managed Expense Trend



Chart 2: Components of FY 2019 Revenue Budget

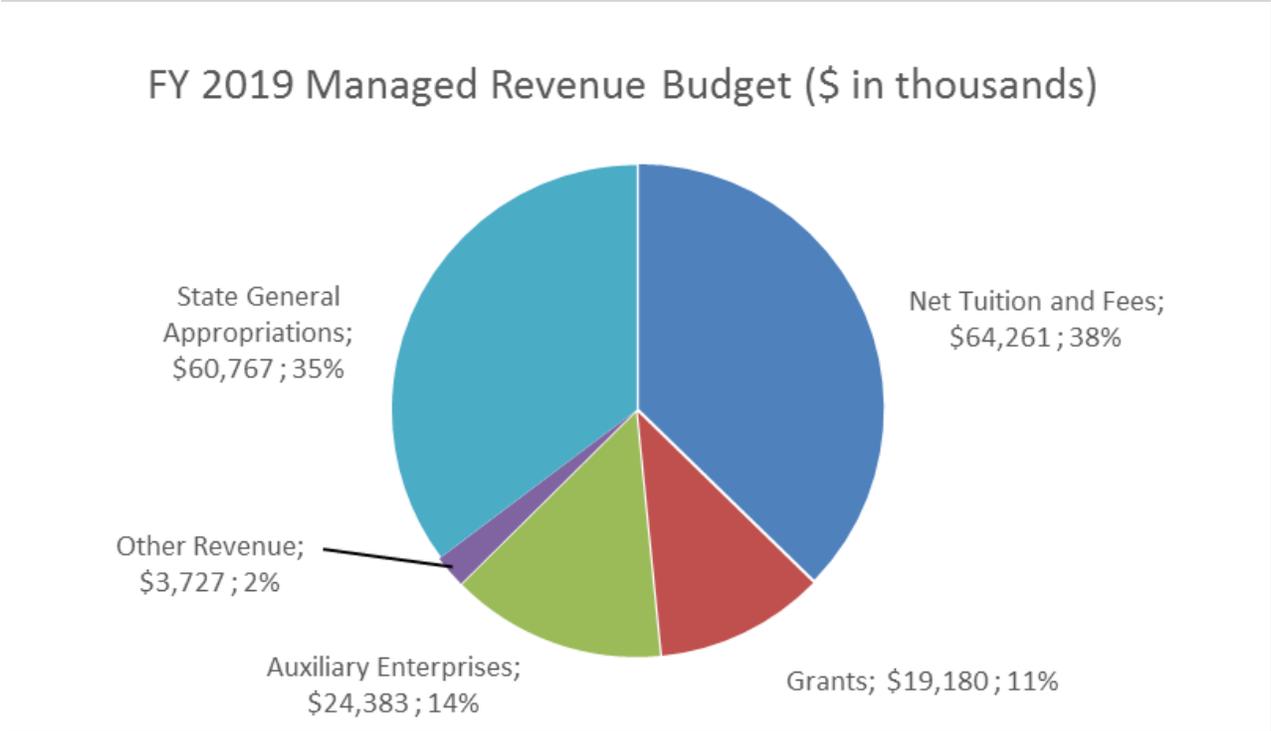


Chart 3: Components of FY 2019 Expense Budget

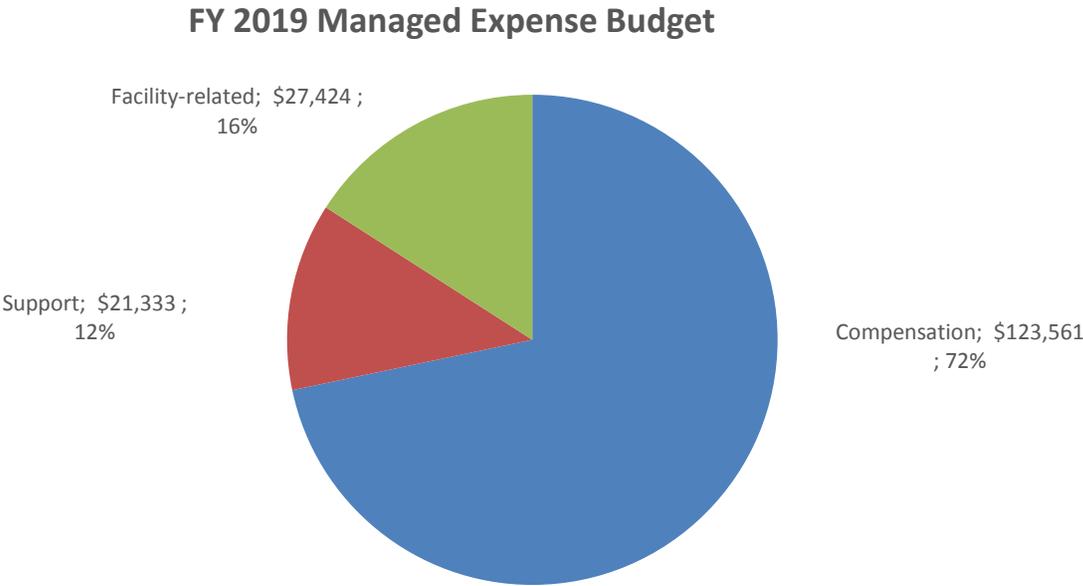


Chart 4: Credit Hours Delivered by Student Type – Full Years 2012 - 2017

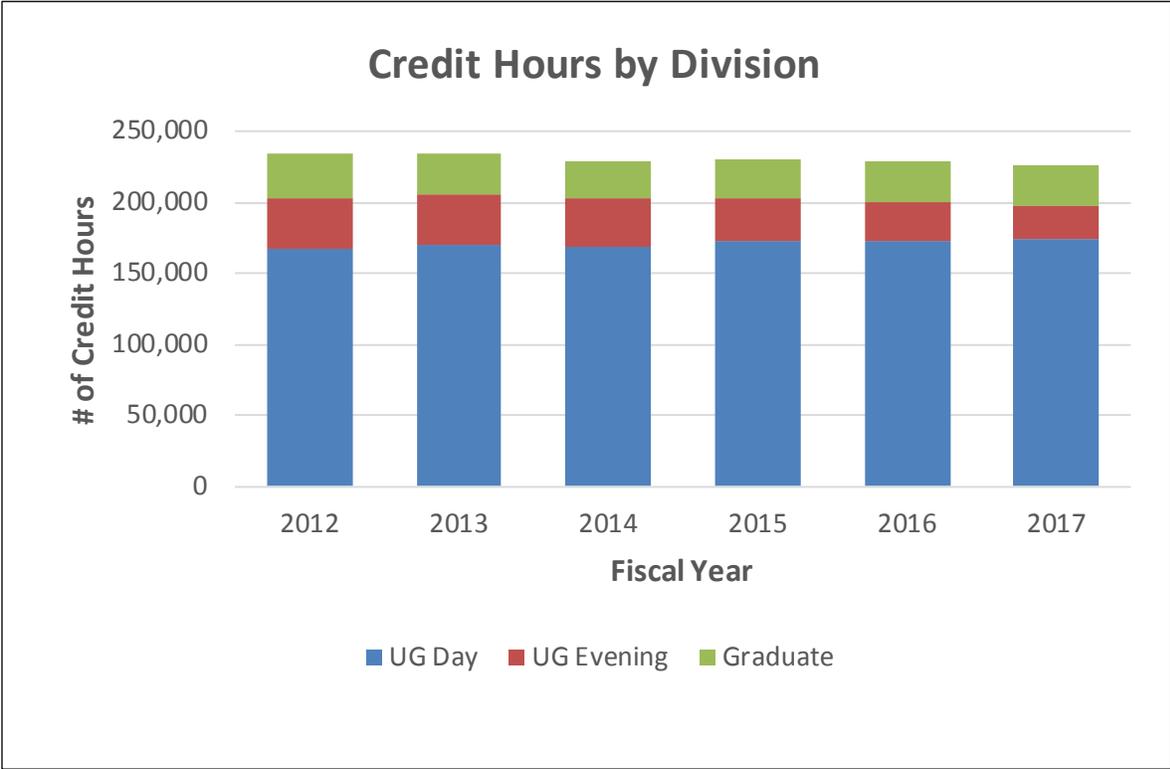


Chart 5: Preliminary Fall Enrollments (Registrations) for 2016 - 2018 (Fall only) as of May 11th

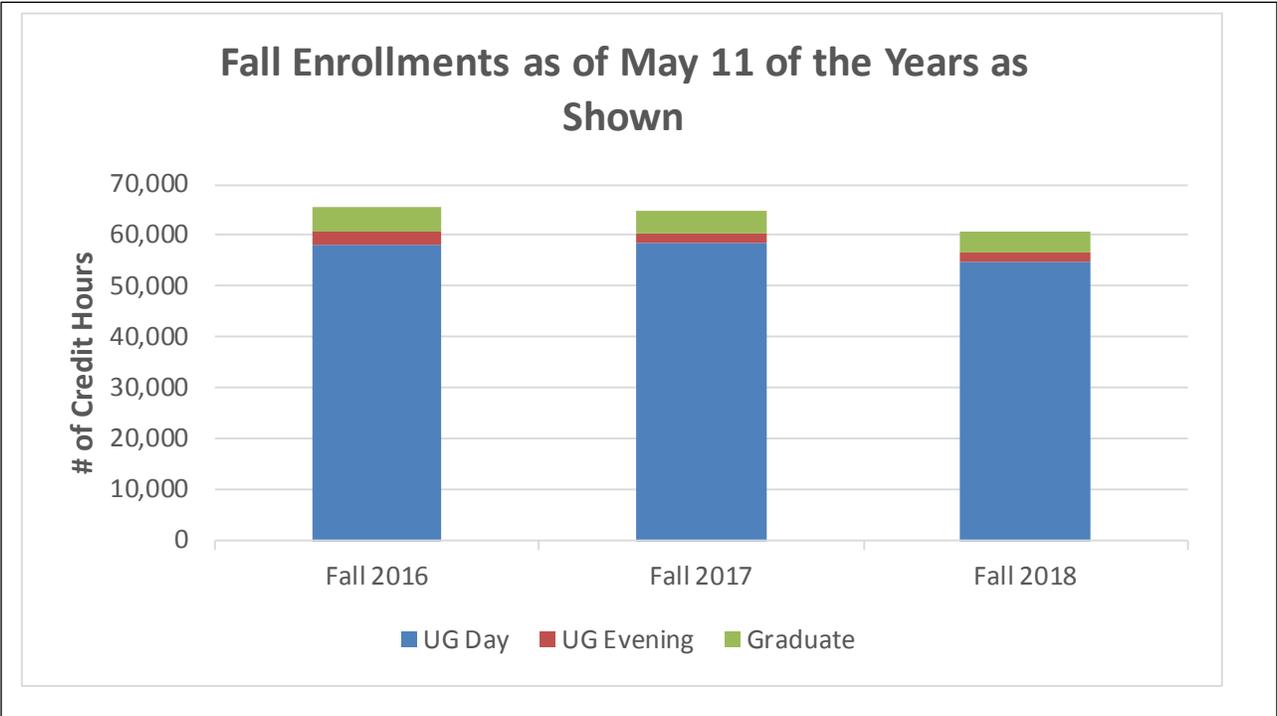


Table 1: Managed Revenue

Revenue (\$ in millions)	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change
Net Tuition and Fees	\$53.1	\$57.9	\$61.2	\$63.5	\$64.3	\$0.7	1.1%
Federal, State, Private Grants	55.1	56.4	58.8	59.9	60.8	0.9	1.5%
Auxiliary Enterprises	17.7	21.0	22.4	23.2	24.4	1.2	5.1%
State General Appropriations	19.8	18.8	19.3	18.6	19.2	0.6	3.0%
Other Revenue	4.1	4.3	5.3	3.1	3.6	0.4	14.1%
Total Managed Revenue	\$149.7	\$158.4	\$167.0	\$168.4	\$172.2	\$3.8	2.2%

Table 2: Fee Revenue

Fee Revenue (\$ in millions)	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change	Percent Fee Increase
University Fee	\$55.0	\$59.4	\$61.9	\$64.1	\$66.1	\$2.0	3.1%	5.4%
Capital Improvement Fee	1.2	1.7	2.6	2.8	2.8	0.0	-0.8%	7.0%
SGA Fee	0.0	0.0	0.5	0.6	0.6	0.0	1.2%	0.0%
Other Fee Revenue	3.7	3.9	4.5	5.2	5.9	0.7	14.3%	Varies
Total Fee Revenue	\$59.9	\$65.1	\$69.6	\$72.7	\$75.4	\$2.7	3.7%	

Note: Other Fee Revenue includes on-line, differential, lab, matriculation, Summer Bridge, housing premium and miscellaneous fees

Table 3: Budget Impact of Undergraduate Day Tuition & Fee Scenarios

Tuition & Fee Rate Change Impact			
% Change in Undergrad Tuition & Fees	FY 2019 Budget Impact (in \$M)	Rate Change From FY18	New Rate For FY19
4.0%	\$(1.0)	\$411	\$10,689
5.0%	\$(0.5)	\$514	\$10,792
5.9%	\$0.0	\$606	\$10,884
7.0%	\$0.6	\$719	\$10,997
8.0%	\$1.1	\$822	\$11,100

Note: all calculations based on In-state UG Day Tuition, University Fee, Capital Improvement Fee, and SGA Fee

5.9% is the current rate for the FY 2019 budget.

Table 4: Historical Credit Hours by Division

Student Type	Full Fiscal Year Credit Hours				
	2013	2014	2015	2016	2017
Undergraduate Day	169,552	168,919	172,772	173,274	173,338
Continuing Education	36,397	33,594	29,856	26,935	24,171
Graduate	27,799	25,983	27,255	27,941	27,839
Total Credit Hours	233,748	228,495	229,883	228,150	225,348
<i>Year over year %</i>		<i>(2.2%)</i>	<i>0.6%</i>	<i>(0.8%)</i>	<i>(1.2%)</i>

Table 5: Financial Aid

Financial Aid (\$ in millions)	FY2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change
Tuition Waivers	\$1.6	\$2.5	\$2.7	\$2.6	<i>\$(0.1)</i>	<i>(5.0%)</i>
Scholarships & Grants	20.0	20.8	20.9	22.8	2.0	9.4%
Total Financial Aid	21.6	23.3	23.6	25.4	1.8	7.7%
As a % of Gross Tuition and Fees	27.2%	27.6%	27.1%	27.2%		

Financial Aid by Funding Source	Educational & General		Residence Hall		Gifts	Total
		Grants	Trust Fund			
FY 2019 Budget by Source (\$ millions)		\$6.7	\$16.8	\$1.3	\$0.6	\$25.4
FY 2019 Budget by Source (% of total)		26.4%	66.0%	5.3%	2.3%	100.0%

Note: FY 2019 Education & General comprised of \$2.6M in tuition waivers and \$4.1M in unrestricted institutional aid.

Table 6: State Operating Support

Appropriations (\$ in millions)	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change
General Appropriations Act (GAA)	\$44.0	\$43.5	\$44.9	\$44.4	\$45.3	\$0.9	2.0%
CBA on State Appropriated Payroll	0.0	0.0	0.0	0.9	0.0	-0.9	-100.0%
Funding Formula Allocation	0.0	0.5	0.0	0.0	0.4	0.4	0.0%
Total Base Appropriation	44.0	44.0	44.9	45.3	45.7	0.4	0.9%
State Paid Fringe	11.8	12.8	14.8	15.5	16.0	0.5	3.3%
Tuition Remission	-0.8	-0.9	-0.9	-0.9	-1.0	0.0	4.0%
Other Appropriations	0.0	0.5	0.0	0.0	0.0	0.0	0.0%
Total State Support	\$55.1	\$56.4	\$58.8	\$59.9	\$60.8	\$0.9	1.5%

Table 7: Managed Expenses

Managed Expenses (\$ in millions)	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change
Compensation (See tables 8 - 12 for detail)	\$107.5	\$112.4	\$118.3	\$122.8	\$123.6	\$0.8	0.7%
<i>Administrative Expenses</i>	\$4.4	\$5.0	\$5.2	\$5.1	\$5.4	\$0.3	5.9%
<i>Programmatic Operational Supplies</i>	\$3.3	\$3.2	\$3.1	\$2.7	\$3.2	\$0.5	16.9%
<i>Contracted Services</i>	\$4.4	\$3.9	\$3.7	\$3.2	\$3.9	\$0.7	22.6%
<i>IT and Telecom</i>	\$4.4	\$5.1	\$4.7	\$4.9	\$5.9	\$0.9	18.8%
<i>Contingency</i>	\$0.0	\$0.0	\$0.0	\$1.2	\$1.7	\$0.5	43.1%
<i>Other</i>	\$1.4	\$1.4	\$1.3	\$1.3	\$1.3	\$0.0	0.4%
Total Support	17.8	18.6	18.0	18.4	21.3	2.9	15.8%
<i>Utilities</i>	4.3	4.3	4.2	4.0	4.2	0.2	5.2%
<i>MSCBA Assessment & Interest Expense</i>	10.7	14.1	15.2	16.3	16.9	0.6	3.8%
<i>Space Rental</i>	1.7	1.5	1.4	1.7	1.7	0.0	2.5%
<i>Construction & Improvement</i>	2.8	3.0	3.8	4.1	4.6	0.5	12.1%
<i>Other</i>	0.6	0.0	0.0	0.0	0.0	0.0	0.0%
Total Facility-related	20.1	22.9	24.7	26.1	27.5	1.4	5.3%
Total Managed Expenses	\$145.4	\$153.9	\$160.9	\$167.2	\$172.3	\$5.1	3.0%

Table 8: Compensation

Salaries and Wages (\$ in millions)	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Projected	FY 2019 Budget	Amount Change	Percent Change
Benefitted Faculty and Staff	\$67.0	\$70.1	\$71.7	\$74.1	\$73.7	-\$0.4	-0.5%
Adjunct Faculty	11.3	12.0	11.8	12.3	12.6	0.3	2.2%
Student Labor	2.9	3.3	3.1	3.0	3.2	0.2	5.6%
Contract Employees	2.1	1.9	2.2	1.9	1.9	0.1	4.3%
Other Labor	3.7	3.0	3.0	3.4	3.3	-0.1	-2.3%
Total Salaries and Wages	\$87.0	\$90.2	\$91.9	\$94.7	\$94.8	\$0.1	0.1%
Fringe Benefits	20.5	22.3	26.4	28.0	28.8	0.7	2.7%
Total Compensation	\$107.5	\$112.4	\$118.3	\$122.8	\$123.6	\$0.8	0.7%

Note: Other Labor includes overtime, vacation, holiday, sick payouts, and other categories.

Table 9: Financial Full-Time Benefitted Employees (FFTE) by Union Classification

Financial Full-Time Benefitted Employees (FFTE)*	FY 2016 Budget	FY 2017 Budget	FY 2018 Budget	FY 2019 Budget	FFTE Change	% Change FY18-FY19	FY 19 % of Total
Clerical Union (AFSCME)	253	257	253	252	(1)	-0.4%	26.2%
Professional Union (APA)	276	283	276	283	8	2.8%	29.4%
Day and DGCE Faculty (MSCA)	371	377	362	364	3	0.7%	37.9%
Professional Non-Union (NUP)	58	58	62	63	2	2.4%	6.6%
Clerical Non-Union (NUC)	6	6	9	10	1	11.1%	1.0%
Total FFTE	964	981	961	973	12	1.2%	101.2%

*Financial Full-Time Benefitted Employees is equal to the ratio of the total number of paid hours to benefitted employees during the fiscal year (full time and part time) by the number of working hours in the same period.

Table 10: Financial Full-Time Benefitted Employees (FFTE) by Division

Financial Full-Time Benefitted Employees (FFTE)	FY 2018 Budget	FY 2019 Budget	FY18 % of Total	% Change FY18-FY19
Academic Affairs	531	534	54.9%	0.5%
Executive Vice President	237	238	24.4%	0.4%
Institutional Advancement	29	29	3.0%	0.0%
Finance and Facilities	117	119	12.2%	1.0%
President's Division	46	52	5.3%	12.1%
Inclusive Excellence	2	2	0.2%	0.0%
Total Financial Full-Time Benefitted Employees	962	973	100.0%	1.1%

Note: In FY 2018 with the incoming new President, the previous Administration Division was abolished. Departments were reassigned between the President's Division, Executive VP Division, and Finance and Facilities.

Table 11: Salary and Wages for Benefited Employees by Division

Salary and Wages for Benefited Employees by Division (\$ in thousands)	FY 2018 Budget	FY 2019 Budget	Amount Change	Percent Change
Academic Affairs	\$45,159	\$46,325	\$1,166	2.6%
Executive Vice President	17,188	17,420	232	1.4%
Institutional Advancement	2,321	2,404	83	3.6%
Finance and Facilities	7,421	7,710	289	3.9%
President's Division	3,544	3,841	297	8.4%
Inclusive Excellence	240	236	(4)	-1.7%
APA/NUP Other Increases	60	128	68	113.9%
MSCA Other Increases	601	633	32	5.3%
AFSCME/NUC Other Increases	186	156	(30)	-16.0%
Vacancy Savings Target (University-wide)	(1,534)	(5,146)	(3,611)	235.4%
Total Financial Full-Time Benefitted Employees	\$75,184	\$73,707	(\$1,478)	-2.0%

Table 12: FY2019 Frozen Positions as of May 08, 2018

Vacant Positions Impacted by Hiring Freeze - as of May 08, 2018		
Division	FY2019 \$ Budget	FY2019 FTE Budget
Academic Affairs	\$ 2,807,906	37.1
Executive Vice President	\$ 1,529,512	26.0
Institutional Advancement	\$ 207,833	3.0
Finance & Facilities	\$ 402,192	9.0
President's Division	\$ 266,555	4.6
Inclusive Excellence	\$ -	-
Total	\$ 5,213,998	78.6
FY2019 Vacancy Target (University-wide)	\$ 5,145,783	
Over/(Under) Vacancy Target	\$ 68,215	

Note: Table 12 reflects vacant positions by division when the hiring freeze went into effect on May 08, 2018.

Table 13: Fringe Benefit Rates as set by the Commonwealth

Benefit Description	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	FY 2018 Actual	FY 2019 Budget	Absolute Change	Estimate Change
Group Insurance	16.0%	18.8%	22.7%	22.1%	22.1%	0.0%	0.1%
Retirement	10.4%	9.5%	10.0%	11.8%	12.1%	0.3%	2.1%
Terminal Leave	0.9%	1.0%	0.8%	1.0%	1.3%	0.3%	24.8%
Subtotal	27.3%	29.2%	33.5%	34.9%	35.4%	0.5%	1.5%
Unemployment Insurance	0.3%	0.3%	0.3%	0.2%	0.3%	0.1%	59.0%
Universal Health Insurance	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	63.3%
Medicare Tax	1.3%	1.3%	1.3%	1.2%	1.3%	0.1%	11.5%
Subtotal	1.6%	1.7%	1.7%	1.5%	1.7%	0.3%	19.6%
Total Fringe Benefit Rate	28.9%	30.8%	35.2%	36.3%	37.1%	0.8%	2.2%

Table 14: Cash Flow Projection

<i>(\$ in thousands)</i>		FY 2019 Budget
Cash Flow Projection Summary		
Beginning Cash Balance as of 7/1/2018 (estimated)		\$14,500
Cash Flows:		
Managed Net Income		\$0
Reduce by capitalization assumption (balance sheet)		(\$800)
Reduce by principal payments (balance sheet)		(\$1,951)
Net Change in Cash Flows for FY18		(\$2,751)
End of Year Cash Balance as of 6/30/2019 (estimated)		\$11,749

Appendix I: Trust Fund Matrix

Trust Fund	Description	Examples
L3_Agency	Funds held by Salem State as custodian / fiscal agent for others	Fund 6222 - Unclaimed Checks
L3_Education & General Funds	Basic operations of the university;unrestricted funds	Fund 1000 - State Maintenance Appropriation
L3_Gifts	Funds donated by others outside the university for a specific purpose	Fund 2313 - Departmental Gifts
L3_Grants	Funds provided by an external party in return for a specific project or other action by the university. Majority of SSU's grants are for financial aid to students	Fund 2200 -Pell Grant
L3_Net Invested in Capital Assets	Capitalizable facility projects; depreciation; debt.	Fund 7040 - Invested in Cap Assets-Net
L3_Residence Halls	Self-supporting operations that provide services to students, faculty, or staff; restricted by an entity outside of the university (MSCBA owned facility operations)	Fund 2517 - Atlantic Hall
L3_Restricted other	Funds provided by external parties with restrictions on how the funds are to be expended.	Fund 2304 - Alpha Lampda Delta
L3_Total Loan Funds	Funds provided by others for the purpose of Student Financial Aid in the form of loans, not grants. Debt belongs to the recipient, not the university.	Fund 4204 - Graduate Student Loan Fund
I3_Total Restricted Endowments	Most endowments are held by the Foundation, the university has one historical endowed fund.	Fund 5002- Cruttenden Endowment
L3_Unrestricted Auxiliaries	Self-supporting operations that provide services to students, faculty, or staff; not restricted by an entity outside of the university.	Fund 6204- Dining Hall Trust Fund

Appendix II: Vendors with Contracts in Excess of \$500,000 which are pre-approved upon approval of FY 2019 Budget

Salem State University FY 2019 Budget Package

Pre-approval of Contracts Exceeding \$500,000 in Accordance with Trust Fund Guidelines

Vendor Name	Vendor Description	Anticipated spending FY19	Trust Fund Name	PeopleSoft Fund Number	PeopleSoft Fund Name
331 Lafayette LLC	Lease expense	\$542,940	Educational & General	1100	University Fee
Cavalier Coach	Shuttle & charter bus service	\$550,000	Educational & General	1100	University Fee
Chartwells*	Food service provider	\$7,433,000	Unrestricted Auxiliaries	6204	Dining Trust Fund
Direct Energy Marketing Inc.	Natural gas delivery supplier	\$688,000	General**	1100	University Fee
Direct Energy Services LLC	Electric delivery supplier	\$1,500,000	General**	1100	University Fee
EAB	Marketing	\$750,000	Educational & General	1100	University Fee
Follett Higher Education Group***	Book vouchers, education materials	\$1,300,000	Educational & General	1100	University Fee
National Grid Electric	Electric service	\$1,250,000	General**	1100	University Fee
Red Thread LLC	Furniture & equip purchases	\$500,000	Educational & General	1100	University Fee
Salem State University-Assistance Corp.	Lease expense, SSU assistance	\$570,000	Educational & General	1100	University Fee
Software House International	Software subscription & support	\$660,000	Educational & General	1100	University Fee
To Be Determined	Roofing contactor for Meier Hall	\$1,200,000	Educational & General	1100	University Fee
University Health Plans, Inc.****	Student health insurance	\$1,745,000	Agency	6216	Health Insurance

Most of the above vendor are signed to multi-year contracts

* The University treats the revenues and expense to the food service provider as a flow-through within a liability account, based on the nature of the existing contract. Board plan override, commissions and a lump sum payments are recorded as revenues when earned

** Utility costs are allocated between Educational and General Trust Funds and the Residence Hall Trust Fund

*** The University treats the revenues and expense for Follett as a flow-through within a liability account, based on the nature of the existing contract.

**** The University treats the revenues and expense For University Health Plans, Inc.as a flow-through within a liability account, based on the nature of the existing contract

Appendix III: List of Proposed Facilities Projects

Salem State University FY 2019 Budget Package

Location	Area	Project	Additional Funding	Recommended Funding Amount
Administration Building		Roof Replacement Study		\$26,200
Berry Library	Mechanical Room	Repair or Replacement of Climate Cooling System		\$200,000
Meier Hall		Roof Replacement	DCAMM (\$753,344)	\$1,136,656
O'Keefe Center	All Spaces	Master Plan Update For O'Keefe		\$30,000
Sophia Gorden Center		Investigate Humidity Issues / HVAC Solutions		\$50,000
Sullivan Building	Basement Storage	Structural Upgrades to Brace Failing Steel		\$500,000
Sullivan Building		Insulating Roof Deck to Prevent Ice Dams	DCAMM (\$272,193)	\$27,807
Campus Wide	IA Signage	Annual Fund		\$25,000
Campus Wide	ADA Committee	Annual Fund For Committee		\$10,000
Campus Wide	Classroom Refresh	Annual Fund		\$200,000
Contingency		TBD		\$420,000
				\$2,625,663



**Schedule of Student Charges
2018-19 Academic Year**

IN-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Day Undergraduate					
Tuition					
In-State	\$37.92	\$455.00	\$37.92	\$455.00	\$910.00
Fees					
University Fee ¹	\$395.95	\$4,751.40	\$395.95	\$4,751.40	\$9,502.80
Capital Improvement Fee	\$15.45	\$185.40	\$15.45	\$185.40	\$370.80
SGA Fee	\$4.20	\$50.40	\$4.20	\$50.40	\$100.80
Total Tuition and Fees					
In-State	\$453.52	\$5,442.20	\$453.52	\$5,442.20	\$10,884.40
Evening Undergraduate (SCPS)					
Tuition					
In-State	\$115.00		\$115.00		
Fees					
Course Fee	\$257.20		\$257.20		
Capital Improvement Fee	\$15.75		\$15.75		
SGA Fee	\$4.20		\$4.20		
Total Tuition and Fees					
In-State	\$392.15		\$392.15		
Graduate - Price Group 1					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$261.95		\$261.95		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$417.70		\$417.70		
Graduate - Price Group 2					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$301.35		\$301.35		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$457.10		\$457.10		
Graduate - Price Group 3					
Tuition					
In-State	\$140.00		\$140.00		
Fees					
Course Fee	\$334.05		\$334.05		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
In-State	\$489.80		\$489.80		

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

IN-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Housing ²					
Peabody Hall/Bowditch Hall		\$4,475.00		\$4,475.00	\$8,950.00
Marsh Hall		\$4,982.50		\$4,982.50	\$9,965.00
Bates Complex - Double		\$5,050.00		\$5,050.00	\$10,100.00
Bates Complex - Single		\$5,435.00		\$5,435.00	\$10,870.00
Atlantic Hall - Double		\$5,527.50		\$5,527.50	\$11,055.00
Atlantic Hall - Single		\$6,165.00		\$6,165.00	\$12,330.00
Viking Hall - Double		\$5,092.50		\$5,092.50	\$10,185.00
Viking Hall - Single		\$5,397.50		\$5,397.50	\$10,795.00
Viking Hall - Double Suite		\$5,202.50		\$5,202.50	\$10,405.00
Viking Hall - Single Suite		\$5,507.50		\$5,507.50	\$11,015.00
Meal Plans					
Commuter Meal Plan ³		\$399.00		\$399.00	\$798.00
Resident Meal Plan ⁴		\$399.00		\$399.00	\$798.00
10-Meal Plan		\$1,738.00		\$1,738.00	\$3,476.00
14-Meal Plan ⁵		\$1,886.00		\$1,886.00	\$3,772.00
19-Meal Plan		\$1,973.00		\$1,973.00	\$3,946.00
Miscellaneous Fees					
Mass PIRG Fee (waivable each semester) ⁶		\$10.00		\$10.00	\$20.00
Resident Parking (Atlantic and Peabody lots)		\$275.00		\$275.00	\$550.00
Resident Parking (Bates lot)		\$250.00		\$250.00	\$500.00
Resident Parking (Marsh lot)		\$200.00		\$200.00	\$400.00
Commuter Parking		\$82.50		\$82.50	\$165.00
International Student Fee ⁷		\$375.00		\$375.00	\$750.00
Records Fee-for non-matriculated students		\$10.00		\$10.00	\$20.00

Online courses (undergraduate) per credit ⁸					\$50.00
Health Insurance -- (waivable) ⁹					\$2,985.00
Matriculation Fee -- new matriculated students (one-time)					\$250.00
Differential Fees for Undergraduate Programs					
Art ¹¹		\$125.00		\$125.00	\$250.00
Biology ¹⁰		\$250.00		\$250.00	\$500.00
Chemistry ¹¹		\$250.00		\$250.00	\$500.00
Communications ¹¹		\$125.00		\$125.00	\$250.00
Computer Science ¹¹		\$250.00		\$250.00	\$500.00
Dance ¹¹		\$125.00		\$125.00	\$250.00
Education ¹⁰		\$125.00		\$125.00	\$250.00
Geography (including Cartography) ¹¹		\$250.00		\$250.00	\$500.00
Geology ¹¹		\$250.00		\$250.00	\$500.00
Music ¹¹		\$125.00		\$125.00	\$250.00
Nursing ¹⁰		\$500.00		\$500.00	\$1,000.00
Social Work ¹⁰		\$125.00		\$125.00	\$250.00
Theatre (BA and BFA) ¹¹		\$125.00		\$125.00	\$250.00
Cohort Based Program Cost					
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2017 Cohort per credit ¹²					\$470.00
Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) Summer 2018 Cohort per credit ¹²					\$525.00

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

NOTES:

- 1 The University Fee represents the fee anticipated for 2018-19. Fees may change by action of the Board of Trustees.
- 2 Housing rates include (1) \$20 per semester/\$40 per year Residence Hall Association Fee for all residence halls; and (2) \$305 per semester/\$610 per year Technology/Student Fee for Bates (Double); \$362.50 per semester/\$725 per year Technology/Student Fee for Atlantic Hall (double), Marsh Hall and Viking Hall; \$400 per semester/\$800 per year Technology/Student Service Fee for Bowditch, Peabody, Bates (Single) and Atlantic Hall (Single).
- 3 Charged to all commuter students. Required for all first-year students in first two semesters of attendance; waivable for other students. Includes \$302 dining dollars and \$97 ClipperCash per semester.
- 4 Minimum required for residents of Atlantic Hall and Bates. Includes \$302 dining dollars and \$97 Clipper Cash per semester.
- 5 Minimum required for residents of Peabody, Bowditch, Marsh & Viking Halls. All plans include \$97 ClipperCash per semester 10-meal and 14-meal plans include \$200 Dining Dollars; 19-meal plan includes \$100 Dining Dollars.
- 6 Charged for all day students each semester. Student may opt out and have fee waived on line.
- 7 Applicable to all matriculated international students with a Salem State-issued visa (excluding ESL students)
- 8 All undergraduate students taking online courses to be charged \$50 per credit
- 9 Charged for all students enrolled in at least 75 percent of a full-time course load. Student may opt out and have fee waived if covered by other health insurance. Fall only prorated charge is \$1,253 and spring only prorated charge is \$1,748.
- 10 Annual additional fees applicable beginning with academic year 2016-17 entrants to the program (incoming or transfers).
- 11 Annual additional fees applicable beginning with academic year 2017-18 new entrants to the program (incoming or transfers)
- 12 Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) is a cohort based program with a charge of \$470 per credit for Summer 2017 entrants. Summer 2018 entering cohort will be \$525 per credit.

All charges are subject to change.



**Schedule of Student Charges
2018-19 Academic Year**

OUT-OF-STATE	Fall 2018		Spring 2019		Academic Year
	Per Credit	Full-Time	Per Credit	Full-Time	Full-Time
Day Undergraduate					
Tuition					
Out-of-State	\$293.75	\$3,525.00	\$293.75	\$3,525.00	\$7,050.00
Fees					
University Fee ¹	\$421.60	\$5,059.20	\$421.60	\$5,059.20	\$10,118.40
Capital Improvement Fee	\$15.45	\$185.40	\$15.45	\$185.40	\$370.80
SGA Fee	\$4.20	\$50.40	\$4.20	\$50.40	\$100.80
Total Tuition and Fees					
Out-of-State	\$735.00	\$8,820.00	\$735.00	\$8,820.00	\$17,640.00

Evening Undergraduate (SCPS)					
Tuition					
Out-of-State	\$285.00		\$285.00		
Fees					
Course Fee	\$257.20		\$257.20		
Capital Improvement Fee	\$15.75		\$15.75		
SGA Fee	\$4.20		\$4.20		
Total Tuition and Fees					
Out-of-State	\$562.15		\$562.15		

(1) International Students - Supplemental Charge - \$140 per credit

Graduate- Price Group 1					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$261.95		\$261.95		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$507.70		\$507.70		

Graduate - Price Group 2					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$301.35		\$301.35		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$547.10		\$547.10		

Graduate - Price Group 3					
Tuition					
Out-of-State	\$230.00		\$230.00		
Fees					
Course Fee	\$334.05		\$334.05		
Capital Improvement Fee	\$15.75		\$15.75		
Total Tuition and Fees					
Out-of-State	\$579.80		\$579.80		

All charges are subject to change.

**Schedule of Student Charges
2018-19 Academic Year**

OUT-OF-STATE	Fall 2018		Spring 2019		Academic Year Full-Time
	Per Credit	Full-Time	Per Credit	Full-Time	
Housing ²					
Peabody Hall/Bowditch Hall		\$4,475.00		\$4,475.00	\$8,950.00
Marsh Hall		\$4,982.50		\$4,982.50	\$9,965.00
Bates Complex - Double		\$5,050.00		\$5,050.00	\$10,100.00
Bates Complex - Single		\$5,435.00		\$5,435.00	\$10,870.00
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Resident Parking (Atlantic and Peabody lots)		\$275.00		\$275.00	\$550.00
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Matriculation Fee -- new matriculated students (one-time)					\$250.00
Differential Fees for Undergraduate Programs					
Art ¹¹		\$125.00		\$125.00	\$250.00
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Computer Science ¹¹		\$250.00		\$250.00	\$500.00
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Education ¹⁰		\$125.00		\$125.00	\$250.00
Geography (including Cartography) ¹¹		\$250.00		\$250.00	\$500.00
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Music ¹¹		\$125.00		\$125.00	\$250.00
Nursing ¹⁰		\$500.00		\$500.00	\$1,000.00
Social Work ¹⁰		\$125.00		\$125.00	\$250.00
Theatre (BA and BFA) ¹¹		\$125.00		\$125.00	\$250.00
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**Schedule of Student Charges
2018-19 Academic Year**

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- 8 All undergraduate students taking online courses to be charged \$50 per credit
- 9 Charged for all students enrolled in at least 75 percent of a full-time course load. Student may opt out and have fee waived if covered by other health insurance. Fall only prorated charge is \$1,253 and spring only prorated charge is \$1,748.
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- 11 Annual additional fees applicable beginning with academic year 2017-18 new entrants to the program (incoming or transfers)
- 12 Accelerated 2nd Degree for Bachelor of Science, Nursing (BSN) is a cohort based program with a charge of \$470 per credit for Summer 2017 entrants. Summer 2018 entering cohort will be \$525 per credit.

All charges are subject to change.

Fees below pertain to those courses offered by the School of Continuing and Professional Studies and School of Graduate Studies

Course fees	Range
Lab fees	\$25 - \$500 per course
Clinical Fees	\$15 - \$100 per course
Nursing Resource Center Fee	\$100 per course
Field Placement Fee for MSW courses (currently)	\$100 - \$250 per course
Institute Fee	\$100 per institute

Below are miscellaneous fees and fines that pertain to specific situations as noted**Application Fees**

Undergraduate Admissions	\$50
Graduate Admissions	\$50/online/\$100 paper
Comprehensive Exam Application-Graduate School	\$50

Parking fines

Various violations	\$25 - \$125 per violation
Violation Appeal Fee if appeal not granted	\$5 per violation

Late fees

Late application for degree (undergraduate and graduate)	\$50
Late payment (tuition and fees)	\$50/month
Payment plans (enrollment fee from TMS)	\$40/semester
Non-credit course fee	varies depending on course
Institutes (wintersession/summer)	varies depending on course

**Salem State University
FY 2019 Tuition and Fees
Graduate**

<u>Approved (AY 2019)</u>	
GRADUATE	
Price Group 1	3% Course Fee increase
Massachusetts Residents	
Per Credit	\$417.70
Per Course (3 credits)	\$1,253.10
Out of State Residents	
Per Credit	\$507.70
Per Course (3 credits)	\$1,523.10
International Student Fee Charge (per semester)	\$375.00
Price Group 2	6% Course Fee increase
Massachusetts Residents	
Per Credit	\$457.10
Per Course (3 credits)	\$1,371.30
Out of State Residents	
Per Credit	\$547.10
Per Course (3 credits)	\$1,641.30
International Student Fee Charge (per semester)	\$375.00
Price Group 3	8% Course Fee increase
Massachusetts Residents	
Per Credit	\$489.80
Per Course (3 credits)	\$1,469.40
Out of State Residents	
Per Credit	\$579.80
Per Course (3 credits)	\$1,739.40
International Student Fee Charge (per semester)	\$375.00

Note: The rates above include Tuition, Course Fee, and Capital Improvement Fee.

**Salem State University
FY 2019 Tuition and Fees
Continuing Education**

	<u>Current (AY 2018)</u>	<u>Proposed (AY 2019)</u>
Continuing Education		
Fall and Spring		4% Course Fee increase
Massachusetts Residents		
Per Credit	\$381.17	\$392.15
Per Course (3 credits)	\$1,143.51	\$1,176.45
Out of State Residents		
Per Credit	\$551.17	\$562.15
Per Course (3 credits)	\$1,653.51	\$1,686.45
International Student Supplemental Charge (per credit)	\$140.00	\$140.00
	<u>Summer 2018</u>	<u>Summer 2019</u>
Summer		4% Course Fee increase
Massachusetts Residents		
Per Credit	\$318.00	\$327.35
Per Course (3 credits)	\$954.00	\$982.05
Out of State Residents		
Per Credit	\$453.00	\$462.35
Per Course (3 credits)	\$1,359.00	\$1,387.05
International Student Supplemental Charge (per credit)	\$140.00	\$140.00

Note 1: The rates above for Fall and Spring include Tuition, Course Fee, Capital Improvement Fee, and SGA Fee.

Note 2: The rates above for Summer include Tuition, Course Fee, and Capital Improvement Fee.

**Salem State University
Graduate Price Groups**

Program	Program
Price Group 1	Price Group 2
Master's Programs	Master's Programs
English (MA)	Behavior Analysis (MS)
History (MA)	Counseling (MS)
Education - Master's Programs	Criminal Justice (MS)
Art (MAT)	Geo-Information Science (MS)
Chemistry (MAT)	Industrial/Organizational Psychology (MS)
Early Childhood Education (MEd)	Mathematics (MS)
Elementary Education (MEd)	Social Work (MSW)
English (MA/MAT)	Education - Master's Programs
English (MAT)	Higher Education in Student Affairs (MEd)
English to Speakers of Other Languages (ESOL) (MAT)	School Counseling (MEd)
History (MAT)	Education - Licensure Only Programs
Leadership in Physical Education & Movement Studies (MEd)	School Adjustment Counselor (Initial Licensure Only)
Library Media Studies (MEd)	School Counseling
Mathematics (MAT)	Graduate Certificate Programs
Middle School Education (MEd)	Applied Behavior Analysis
Middle School Math (MAT)	Clinical Trial Management
Physical Education (MAT)	Computer Science
Reading (MEd)	Counseling
Secondary Education (MEd)	Geo-Information Science
Spanish (MAT)	Sport Development and Management
Special Education (MEd)	
Education - Licensure Only Programs	Price Group 3
Early Childhood Education	Master's Programs
Elementary Education	Accounting (MS)
English to Speakers of Other Languages (ESOL)	Business Administration (MBA)
Mathematics	Nursing (MSN)
Middle School Education (Initial Licensure Only)	Occupational Therapy – Direct Entry (MS)
Reading	Occupational Therapy (MS)
Special Education	Graduate Certificate Programs
Graduate Certificate Programs	Business
Autism Spectrum Disorders	Financial Planning
Digital Studies	Nursing Education
Global Policy Analysis	
Holocaust and Genocide Studies	
Public History	
Public Policy and Administration	
Strategic Communications	
Teaching English to Speakers of Other Languages	
Writing and Rhetoric Studies	
Teacher Leadership	
Certificate of Advanced Graduate Study (CAGS)	
Educational Leadership	

WEALTH MANAGEMENT REVIEW



May 23, 2018

Michael Tyler, CFA
Chief Investment Officer
617-897-1122

John F. Doherty, CFP®
Vice President
781-581-4215

FF 68 of 125

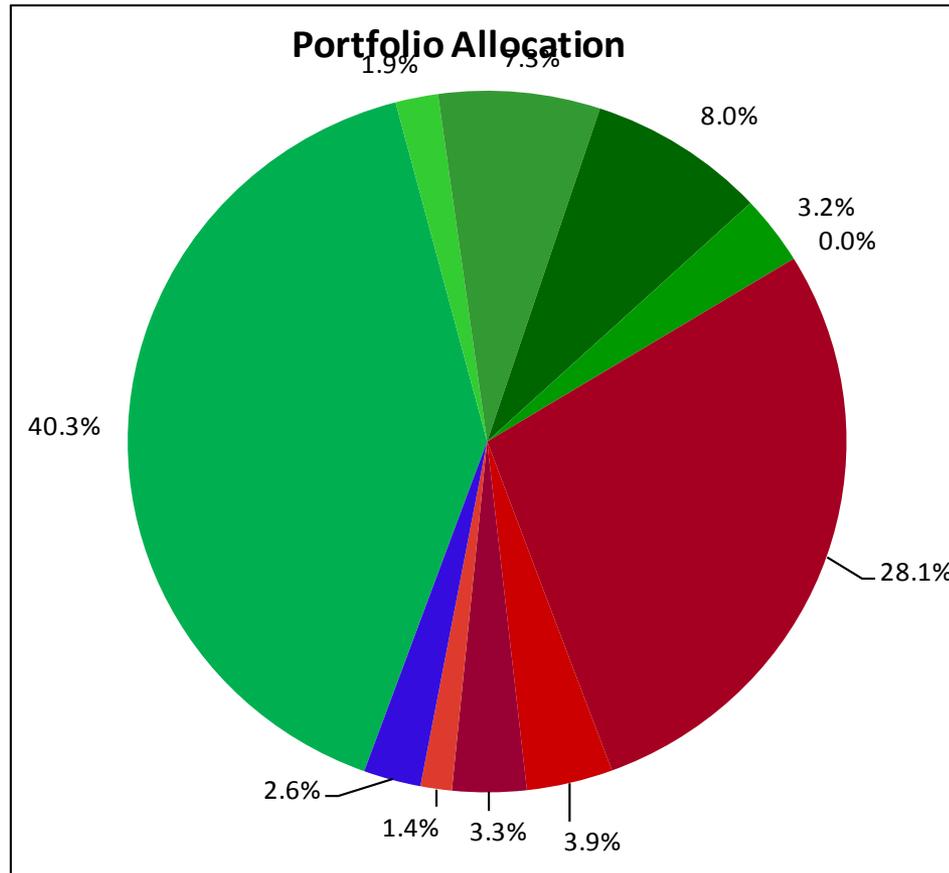
AGENDA

Portfolio Review	3-5
Investment Policy Checklist	6
Portfolio Performance Review	7-11
Fossil Fuel Divestment & Impact Strategy	12-16
Economic Outlook	17
Asset Allocation – Current Posture	18
Market Monitor	19-26
Appendix	27
Multi-Asset Portfolio Holdings	28
Biographies	29-30
Notices & Disclosure	31



FF 69 of 125

PORTFOLIO REVIEW FOR ACCOUNT #2427524



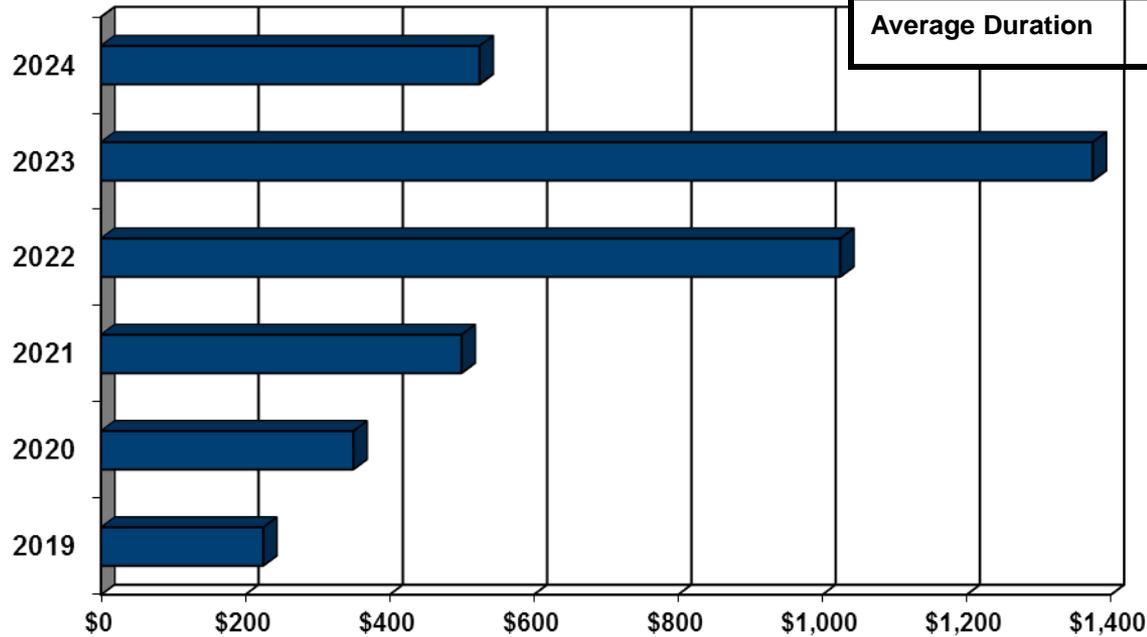
Account Value as of 03/31/2018:
\$14,269,844

Equities	60.7%
■ Individual Stocks	40.3%
■ Small/Mid-Cap ETFs	1.9%
■ Sector & Tactical ETFs	7.3%
■ Internat'l - Developed ETFs	8.0%
■ Internat'l - Emerging ETFs	3.2%
■ Global ex-USA ETFs	0.0%
Fixed Income	36.7%
■ Laddered Bonds & ETFs	28.1%
■ Intermediate Term ETF's	3.9%
■ Floating Rate & TIPS ETFs	3.3%
■ High Yield Mutual Fund	1.4%
Money Market	2.6%
■ Cash	2.6%

FF 70 of 125

BOND MATURITY DISTRIBUTION

	Portfolio	U.S. Intermediate Credit Index
Average Maturity	4.89 years	4.84 years
Average Coupon	3.30%	3.32 %
Average Yield	3.40%	3.36%
Average Duration	4.28 years	4.27 years



	2019	2020	2021	2022	2023	2024
■ Endowment (\$000)	\$225	\$350	\$500	\$1,025	\$1,375	\$525

Par Value (000)

INDIVIDUAL CORPORATE BOND RATINGS

<u>Description</u>	<u>Units</u>	<u>Purchase Date</u>	<u>Time of Purchase</u>	<u>Current</u>	<u>Time of Purchase</u>	<u>Current</u>
			<u>Moody's Rating</u>	<u>Moody's Rating</u>	<u>S&P Rating</u>	<u>S&P Rating</u>
CHUBB HOLDINGS 2.7% 03/13/2023	100,000	10/11/2016	A3	A3	A	A
AMERIPRISE FINANCIAL, INC. 4% 10/15/2023	175,000	12/15/2016	A3	A3	A	A
AT&T INC 3.6% 02/17/2023	225,000	1/30/2018	Baa1	Baa1	BBB+	BBB+
AUTO DESK 3.125% 06/15/2020	200,000	7/18/2017	Baa2	Baa2	BBB	BBB
BANK OF AMERICA CORP 3.3% 01/11/2023	100,000	9/12/2016	Baa1	A3	BBB+	A-
CARDINAL HEALTH, INC. 3.2% 3/15/2023	150,000	7/21/2016	Baa2	Baa2	A-	BBB+
CBS 3.7% 08/15/2024	150,000	4/28/2017	Baa2	Baa2	BBB	BBB
CELGENE CORP 4% 08/15/2023	200,000	12/15/2016	Baa2	Baa2	BBB+	BBB+
CITIGROUP 3.375% 03/01/2023	150,000	7/21/2016	Baa1	Baa1	BBB+	BBB+
CSX CORP 3.4% 08/01/2024	175,000	4/28/2017	Baa1	Baa1	BBB+	BBB+
CVS 3.5% 07/20/2022	200,000	1/19/2017	Baa1	Baa1	BBB+	BBB
DEUTSCHE BANK 2.50% 02/13/19	125,000	2/26/2014	A2	Baa2	A	BBB-
E M C CORP. 2.50% 06/01/20	150,000	7/28/2014	A1	Ba2	A	BB-
EBAY INC 3.8% 03/09/2022	250,000	1/30/2018	Baa1	Baa1	BBB+	BBB+
FORD MOTOR 4.25% 09/20/2022	200,000	1/19/2017	Baa2	Baa2	BBB	BBB
HEWLETT-PACKARD CO 4.05% 09/15/2022	250,000	1/30/2018	Baa2	Baa2	BBB	BBB
HYATT HOTES 3.375% 07/15/2023	125,000	12/20/2017	Baa2	Baa2	BBB	BBB
MONSANTO CO. 2.75% 07/15/21	200,000	11/17/2014	A3	A3	BBB+	BBB
TIME WARNER, INC. 3.4% 06/15/2022	125,000	10/5/2016	Baa2	Baa2	BBB	BBB
VODAFONE GROUP 2.95% 02/19/2023	150,000	10/5/2016	Baa1	Baa1	BBB+	BBB+
WELLS FARGO & CO 2.15% 01/15/19	100,000	12/18/2013	A2	A2	A+	A-
WELLS FARGO & CO 3.00% 01/22/21	100,000	2/3/2015	A2	A2	A+	A-
WHIRLPOOL 4% 03/01/2024	200,000	12/20/2017	Baa1	Baa1	BBB	BBB
XILINX, INC. 3.00% 03/15/21	200,000	11/17/2014	A3	A3	A-	N/R

SALEM STATE: INVESTMENT POLICY CHECKLIST

Key Item (as of Dec. 31, 2017)	Policy	Salem State	Compliant?
Equity ratings: Common stocks: S&P Stock Guide Mutual funds: Morningstar	B+ 3 Star or better	B+ 3 & 4 Star	Yes Yes
Fixed Income: Corporate bonds position limit Maximum maturity Minimum individual bond rating	<35% of fund 7 years Baa / BBB	23.3% 6.7 years Baa2 / BBB-	Yes Yes Yes
Alternative investments: Derivatives, forwards, swaps, futures	Prohibited	None held	Yes
Asset allocation range: Equities Fixed Income Cash	50% - 75% 25% - 50% 0% - 10%	65.2% 30.0% 4.8%	Yes Yes Yes
Fossil fuel divestment: Carbon Underground 200 Alternative energy suppliers	Divest prudently Seek options	None currently held Several funds held	Yes Yes

PORTFOLIO PERFORMANCE

Investment Performance							
Strategy: Growth with Income (Corp)							
As of March 31, 2018							
Asset Class / Benchmark	Ending Market Value	Allocation	1ST QTR 2018	Fiscal YTD	1 Year	3 Year	5 Year
			3 month Return	9 month Return	Annualized Total Return	Annualized Total Return	Annualized Total Return
Salem State University Portfolio	\$14,269,844	100.0%	-0.52%	7.59%	10.42%	6.25%	7.87%
Total Benchmark		100.0%	-0.91%	6.22%	9.08%	6.66%	7.92%
Equities	\$8,664,095	60.7%	-0.31%	12.04%	15.91%	9.18%	11.69%
Multi Asset Equity Blend*		60.0%	-0.79%	10.56%	14.57%	9.96%	11.90%
Fixed Income	\$5,237,502	36.7%	-1.30%	-0.35%	1.04%	1.10%	1.27%
Barclays Interm Credit Index		37.0%	-1.36%	-0.28%	1.10%	1.67%	2.06%
Money Market	\$368,247	2.6%	0.24%	0.60%	0.65%	0.24%	0.00%
Lipper Money Market Index		3.0%	0.27%	0.69%	0.83%	0.35%	0.22%
Portfolio Return Gross of Fee			-0.52%	7.59%	10.42%	6.25%	7.87%
Portfolio Return Net of Fee			-0.63%	7.23%	9.92%	5.77%	7.43%
*Consists of Blended 60/40 S&P 500/MSCI All Country World Index							
Note: Market values shown here and on First Rate performance reports may differ slightly. Values are shown here on a "cash basis." On First Rate performance reports, market values are shown on an "accrual basis" including income earned but not yet received.							
Source: First Rate							

FF 74 of 125

PERFORMANCE REVIEW: FIRST QUARTER 2018

Core U.S. equity closely matched benchmarks and peers

- Only 15 bps spread among EBWM Core, S&P 500, and Morningstar peer index
 - Growth again outperformed value, continuing 2017 trend and helping EBWM
 - Overweight to energy dragged EBWM performance

Despite high index volatility, sector and stock dispersion was small

- This is exactly the opposite from the low-vol / high-dispersion 2017 market

Longer-term Core U.S. equity remains ahead of peer group

- Performance is above peer group median for 1, 3, and 5-year periods

Asset allocation was highly positive through 2017, neutral YTD in 2018

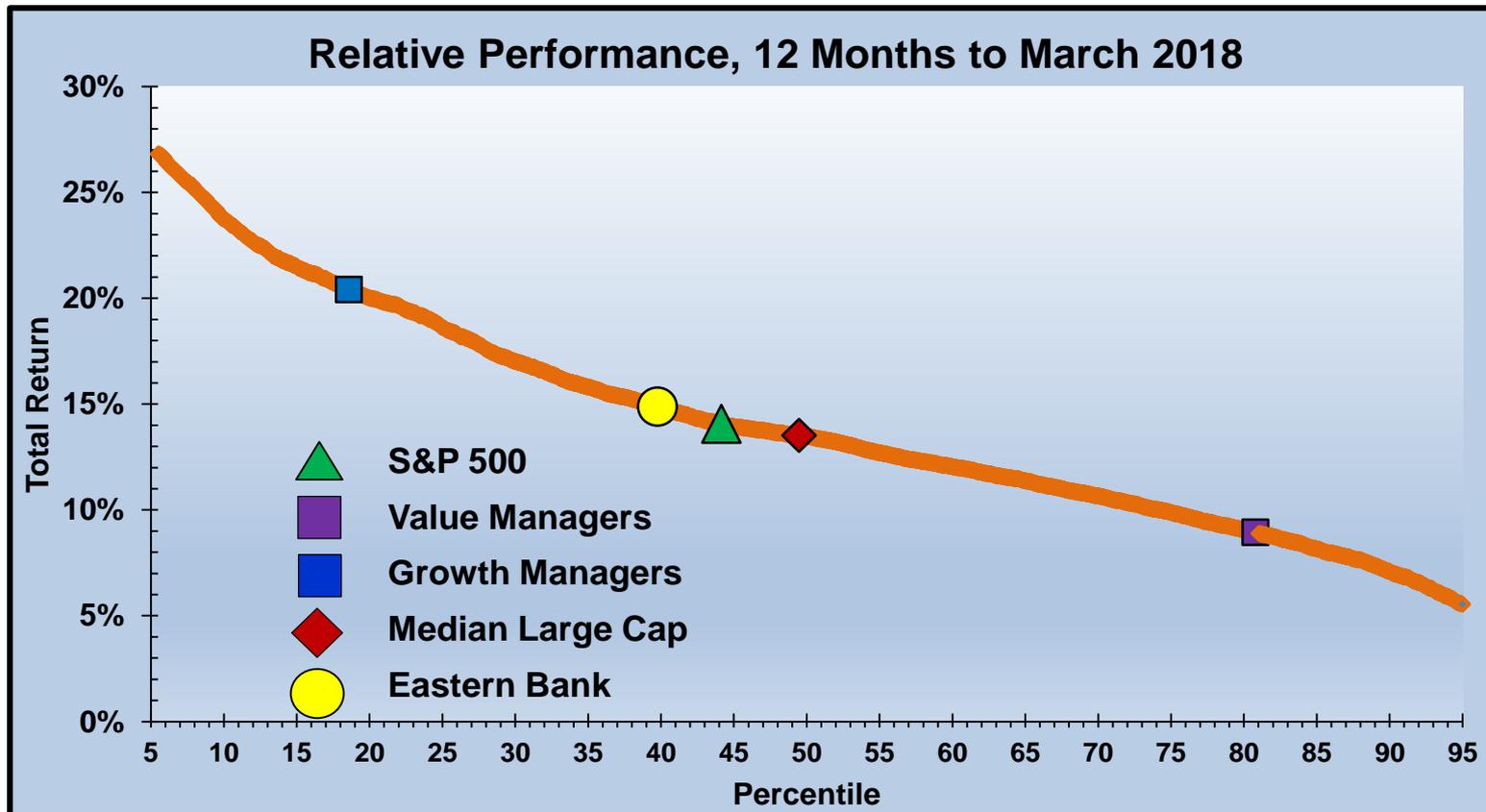
- Equities hammered bonds again in 2017, justifying our big overweight
- We reduced our equity exposure in January 2018, a week before the market top

PERFORMANCE REVIEW: EQUITIES

- Morningstar surveyed ~4,000 active managers of U.S. large-cap equities
- Reversing 2016, growth beat value in 2017 and again in 1Q 2018
- Our Core return on large-cap stocks is consistently second quartile

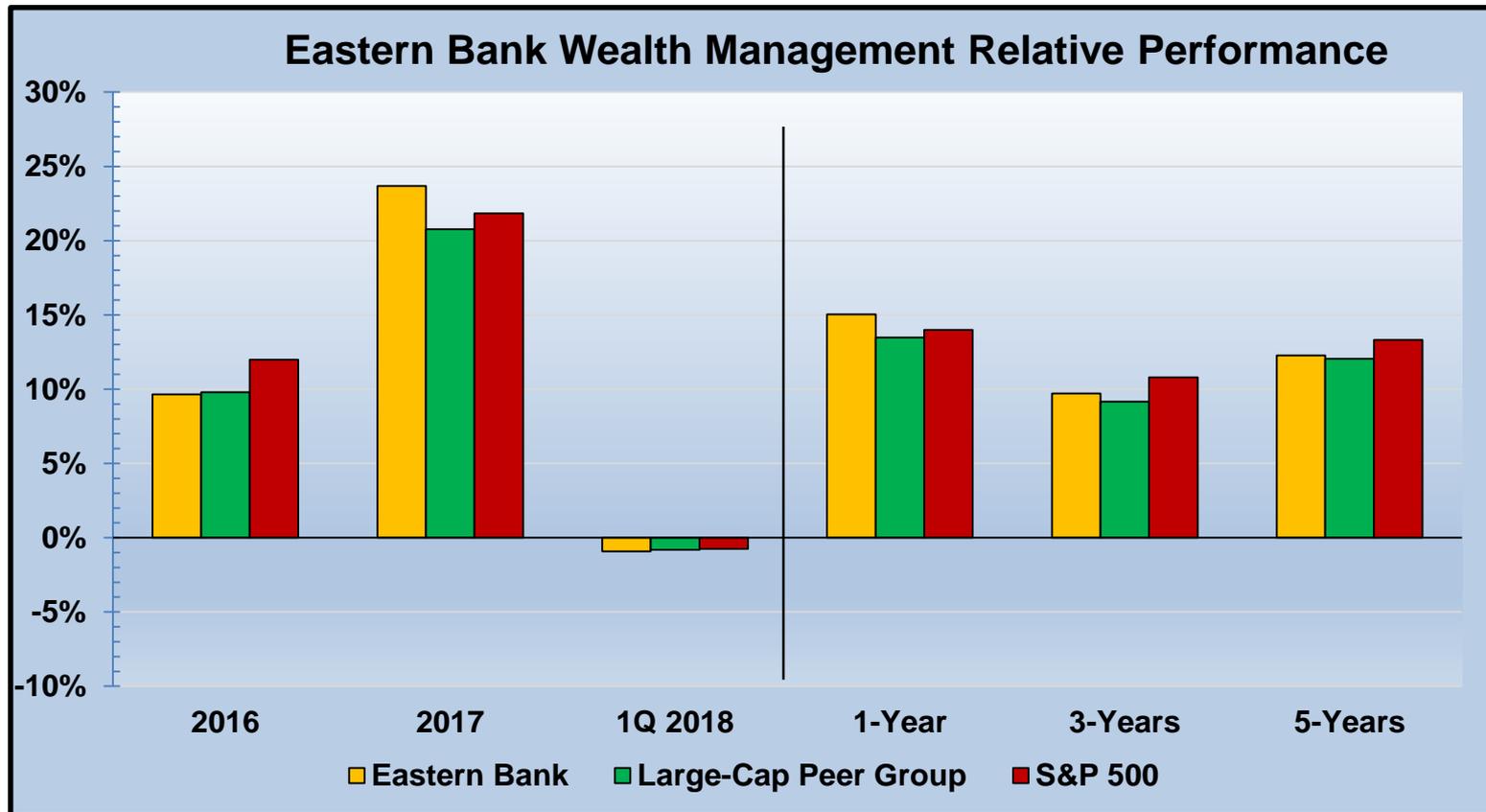
As of March 31, 2018	2016	2017	1Q 2018	1-Year	3-Years	5-Years
Core Large-Cap U.S. Equity	9.66%	23.69%	-0.92%	15.03%	9.72%	12.27%
Average Large-Cap U.S. Equity Manager	9.80%	20.78%	-0.82%	13.48%	9.16%	12.04%
Core (Blended)	10.49%	20.80%	-0.89%	13.32%	9.15%	12.18%
Growth	3.09%	28.31%	2.54%	20.64%	10.97%	14.16%
Value	14.19%	16.01%	-2.44%	9.07%	7.61%	10.34%
S&P 500	11.98%	21.84%	-0.76%	14.00%	10.80%	13.32%
EBWM Percentile	51	32	53	39	41	46
Source: Morningstar, Eastern Bank Wealth Management						

PERFORMANCE REVIEW: EQUITIES – LAST 12 MONTHS



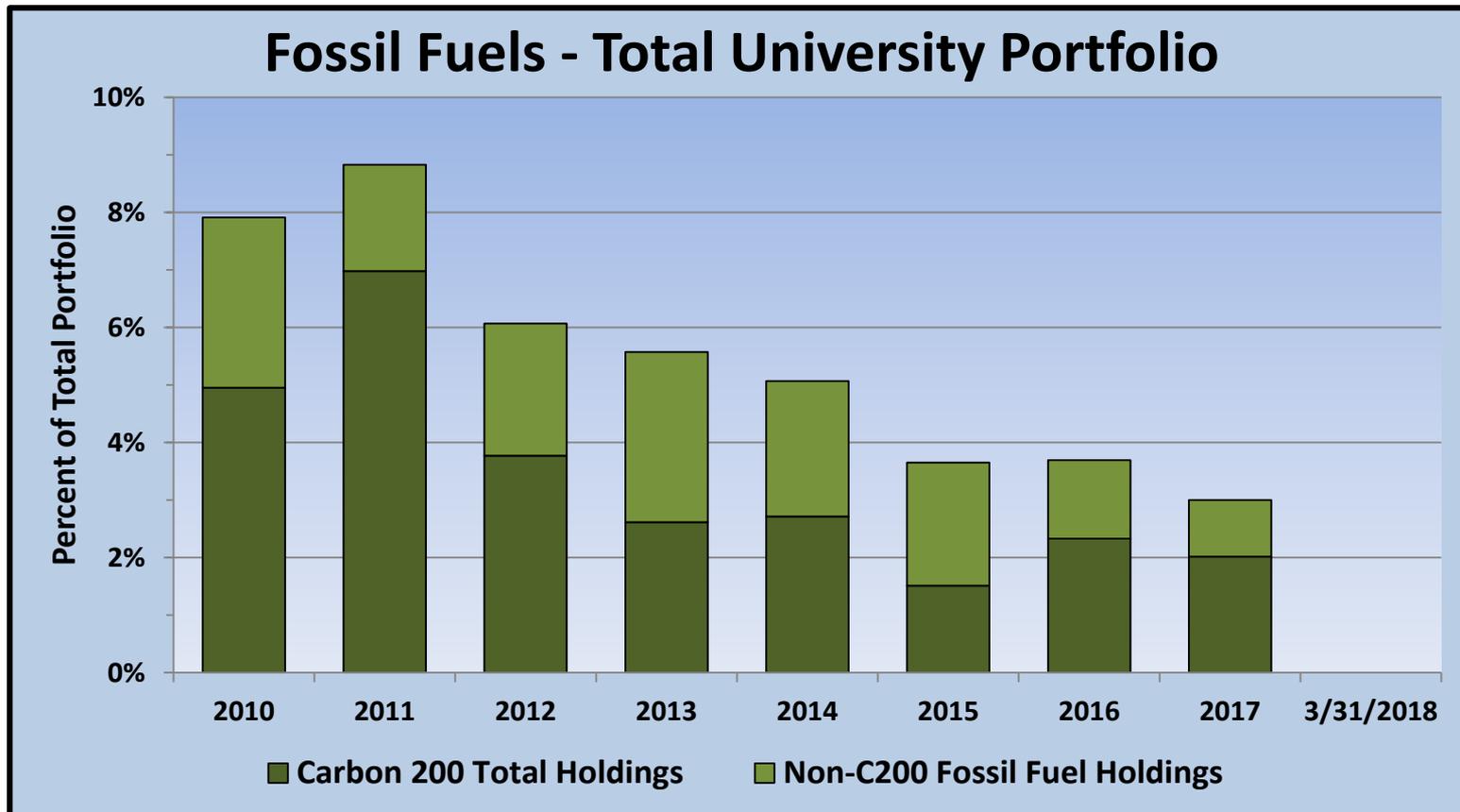
Source: Morningstar, Eastern Bank Wealth Management

EASTERN BANK PERFORMANCE VS. PEERS



Source: Morningstar, Eastern Bank Wealth Management

FOSSIL FUEL OWNERSHIP



CLIMATE CHANGE INVESTMENT STRATEGY

- Divestment (“don’t do evil”)
 - Divest a traditional portfolio of investments in companies that fail our customized screen
- Engagement (activism through ownership)
 - Use the proxy voting process to demand disclosure or change
 - Work with ISS and large shareholders to leverage influence through face-to-face access to management
- Positive impact (“be the change”)
 - Invest in companies that focus on sustainable and responsible activity
 - Not just preaching to the choir
 - Impact investments boost share prices and reduces cost of capital

EASTERN BANK'S DIVESTMENT STRATEGY

- Screen all investable securities on climate change topics
 - *Business lines*: We will not own coal or tar sands (or tobacco) assets
 - *Behavior*: We divest companies with weak governance, irresponsible climate policies, or poor environmental stewardship records
 - *Behavior* screens have been shown to add to performance; *business line* screens sometimes add, sometimes detract
- Our Climate Change strategy is currently fossil-free
 - Divestment of fossil fuel holdings was the goal; market conditions facilitated the timing
 - Rising oil prices in 1Q 2018 led to higher stock prices, enabling exit
- We will always honor our fiduciary duty to the University
 - Future circumstances may make permanent divestment imprudent
 - Possible future investments in enlightened fossil fuel companies may advance an environmentally responsible global energy policy
 - Reinvestment would have to meet a very high standard

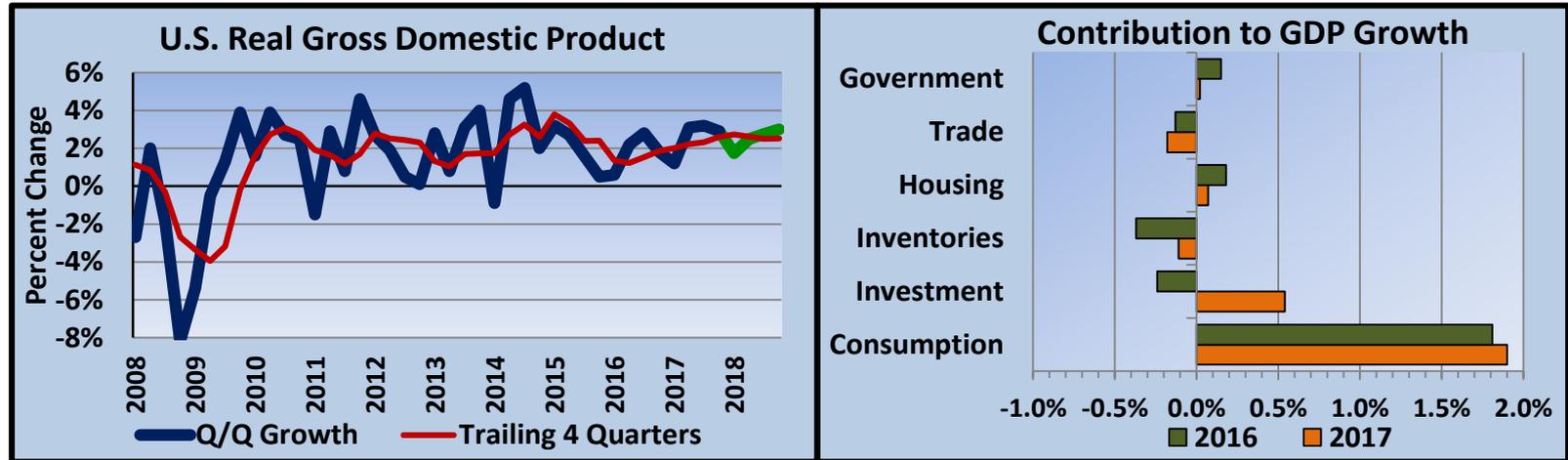
EASTERN BANK'S ENGAGEMENT STRATEGY

- Engagement through ownership is a long-term strategy
 - Investors act individually and in concert, privately and publicly
- Investors target specific issues at a large number of firms
 - Shell recently agreed to reduce its tar sands investments
 - Exxon Mobil agreed to disclose “stranded assets” data
 - Success rates are growing
- Engagement encourages positive actions
 - Better disclosure can elevate the quality of the conversation
 - Investors can push for more actionable changes to capital allocation
 - Investors can target large users to reduce fossil fuel demand
 - Implement conservation and sustainability practices
- Divestment precludes influence

EASTERN BANK'S POSITIVE IMPACT STRATEGY

- We use mutual funds and ETFs rather than individual issues
 - We avoid imprudent company-specific risk deriving from unproven business models, reliance on government subsidies or policies, or uncertain competitive positions
 - Fees and expense ratios are reasonable
- We work closely with Align Impact LLC to select managers
 - Available choices are proliferating, but care is required in selecting fund managers that prioritize investment rigor within their domain expertise
 - Align Impact's team provides assessments of positive impact and identifies emerging managers
 - We evaluate managers with the same care as for traditional portfolios

ECONOMIC OUTLOOK



- The U.S. economy remains on pace to grow by about 3% this year. Consumer spending rose 3.9% last year, and business equipment investment grew at the fastest pace in three years. Since year-end, net exports have improved, buoyed by the dollar's persistent weakness.
- The prospect of a trade war with China threatens to undermine an otherwise healthy economic outlook. So far, both sides have alternated hawkish pronouncements with dovish negotiations, and the outlook is far from certain. Neither the U.S. nor China would benefit from imposition of a high-tariff regime.

ASSET ALLOCATION – CURRENT POSTURE

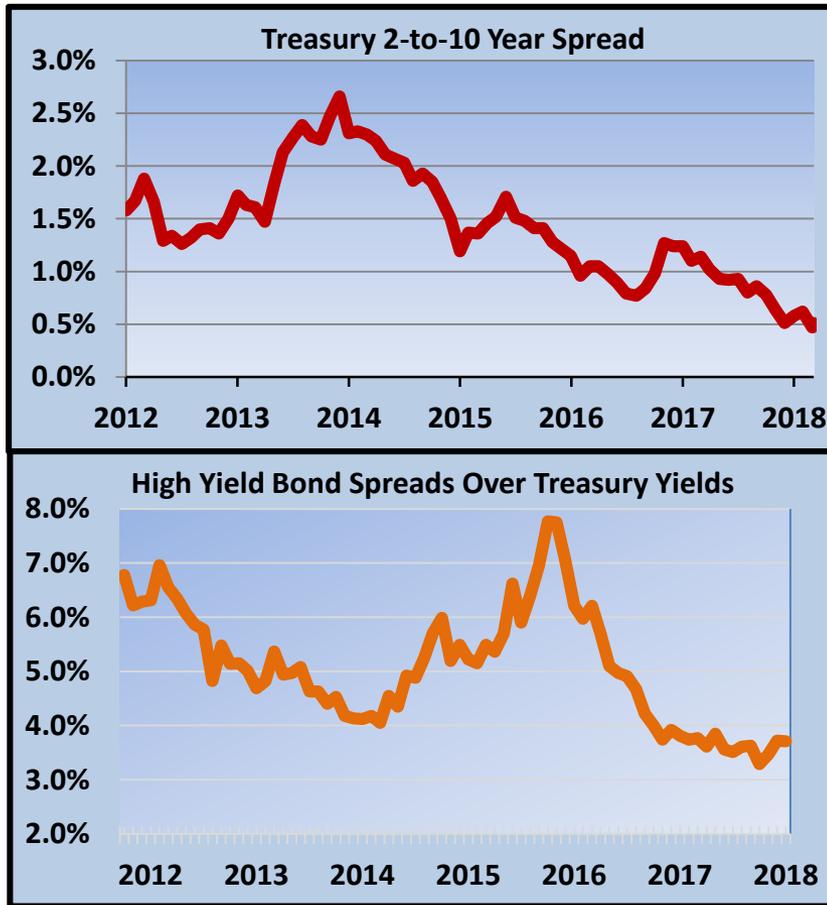
Strategy

- We favor global equities over bonds. Yet despite an overall bullish outlook for stocks, we trimmed our equity overweight from 13% to 4.5% in early January.
- In our global equity portfolios, we remain focused on Europe and emerging markets. Improving fundamentals, Brexit implementation, stubbornly low inflation, and a dwindling inventory of available bonds have forced the ECB to reconsider its aggressive quantitative easing program; the European yield curve has steepened.
- Our fixed income duration remains close to neutral. Strong corporate balance sheets and a strong economy mean credit spreads can remain tight.

Outlook

- Except in Japan, central banks globally are backing away from ultra-loose monetary policy. As sentiment in Europe shifts toward less accommodation, the euro has gained ground relative to the dollar. We think these developments demonstrate confidence in global growth, boosting the outlook for U.S. exporters while creating possible room for importers to raise prices.

MARKET MONITOR – FIXED INCOME



- Yields have been moving higher this year, but the yield curve has continued to flatten. The 2-to-10 year spread closed the first quarter at only 52 basis points. Following a brief inflation scare in January, investors have refocused their attention slight deceleration in economic statistics, risks of a trade war, and a persistently weaker dollar.
- Investors still expect the Federal Reserve to raise interest rates three times this year, but a fourth hike may also be on the horizon.
- U.S. Treasury yields remain high in comparison with near-zero yields on comparable sovereign debt in Europe or Japan. This anomaly is beginning to abate, as European sovereign debt yields are reviving from historic lows.
- Credit spreads are tight, reflecting confidence in the U.S. economy and a grasp for yield. High-yield spreads remain below 400 bps. Some investment-grade spreads are below 100 bps.

FF 86 of 125

ACTIVE FIXED INCOME STRATEGY REVIEW

Strategy

- We remain slightly underweight fixed income. We anticipate long-term interest rates to rise gradually. We have shifted our high-yield corporate bond holdings into shorter-duration funds, seeking to retain our credit risk exposure while reducing interest rate risk. We have added inflation protection in the form of TIPS.

Structure

- Our actively managed fixed income portfolios are structured with durations close to their corresponding benchmarks. Credit spreads have tightened, but strong corporate balance sheets in contrast with widening federal government deficits suggest that investment grade spreads can remain under 100 bps and high yield spreads under 400 bps.

Outlook

- Inflation has been creeping up as a result of tax cuts, a tight housing market, and wage increases. Energy prices have also risen, as OPEC and U.S. producers have exercised discipline; in New England, limited pipeline capacity has exacerbated shortages and price increases. We expect the Consumer Price Index measure of inflation to remain over 2%.

MARKET MONITOR - DOMESTIC EQUITY



- U.S. stocks retreated in March and closed the first quarter about 2% below year-end levels. Volatility has increased sharply, and the S&P 500 recently closed below its 200-day moving average.
- Small-cap indexes have slightly outperformed the S&P 500 this year, holding close to year-end levels. Small-cap companies benefit less from international growth, but they would be harmed less by a potential tariff war and they do benefit more from recently enacted tax reform.
- The strong rally in the market over the past year had been driven by corporate earnings and global economic expansion. These drivers still support equity valuations.

FF 88 of 125

DOMESTIC EQUITY STRATEGY REVIEW

Strategy

- Political uncertainties remain, but the main drivers of the market rally over the past year remain intact. Consumer spending and business equipment investment remain very strong. A more hawkish Federal Reserve and the fear of a possible trade war are keeping the market in check, but we are still positive about the global economy in 2018.
- We think corporate earnings are driving long-term stock prices; political issues buffet the market but ultimately are secondary. We recently sold our Technology and Health Care ETF holdings, and added the Energy sector ETF, taking advantage of a beaten up sector and rising oil prices.

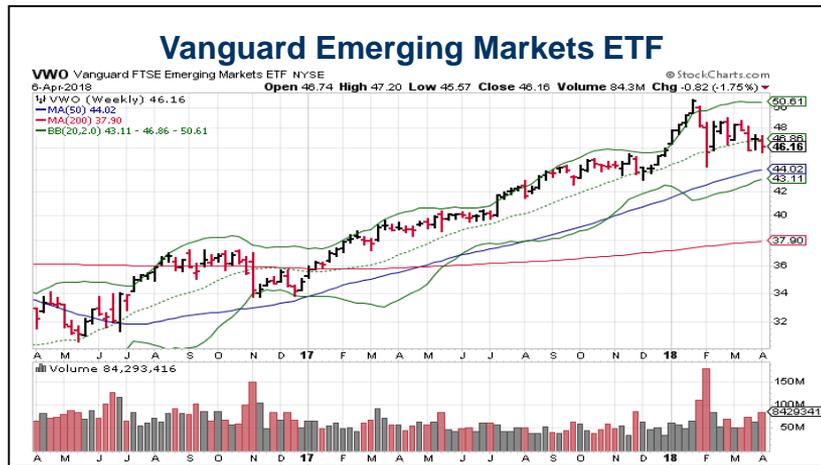
Structure

- Domestic equity portfolios remain diversified across all sectors of the economy. We remain overweight financial and industrial stocks.

Outlook

- Stocks with high sensitivity to rising interest rates and stronger capital spending – banks, industrials, and technology companies, for example – are well-positioned to lead the broad market higher through the balance of 2018.

MARKET MONITOR - INTERNATIONAL EQUITY



- Global equity markets followed the U.S. markets lower through the first quarter. International developed markets lost about 1.5% through the period, as investors feared a possible trade war between the U.S. and China.
- Central bank policy is diverging after several years of unity. The ECB and Bank of Japan remain accommodative, while the Fed continues to raise interest rates. Central banks in Canada and Britain are also tightening.
- Europe's economy is reviving and continues to grow – the Euro area economy grew 0.6% in 4Q 2017, and it appears that 2018 will be another strong year of growth.
- Emerging market economies continue their upswing. These markets are less dependent on commodities prices than in years past, as their domestic economies diversify. China's debt crackdown has focused on state-owned enterprises; the private-sector remains healthy.

FF 90 of 125

INTERNATIONAL EQUITY STRATEGY REVIEW

Strategy

- After seven years of lagging the U.S. markets by a wide margin, foreign markets are attractive where evidence of economic recovery has been accumulating. In Europe, the combination of low valuations and reviving earnings growth is attractive, but bank profits have been under pressure from the European Central Bank's aggressive monetary policy. The ECB recently reduced its bond buying program, but its quantitative easing will continue through at least September 2018.

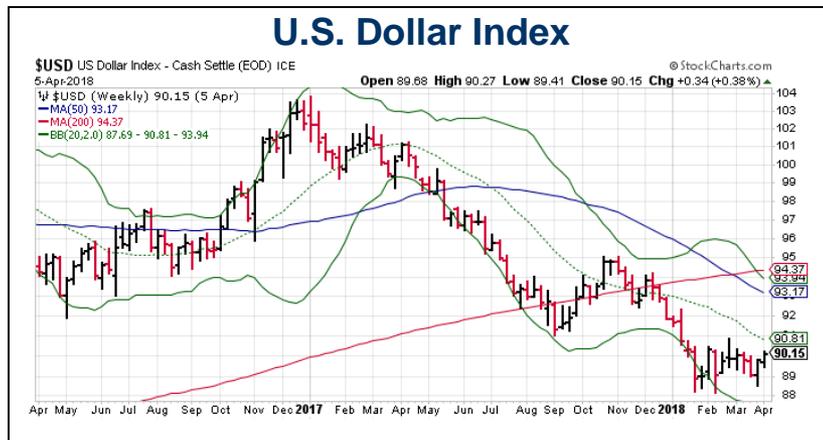
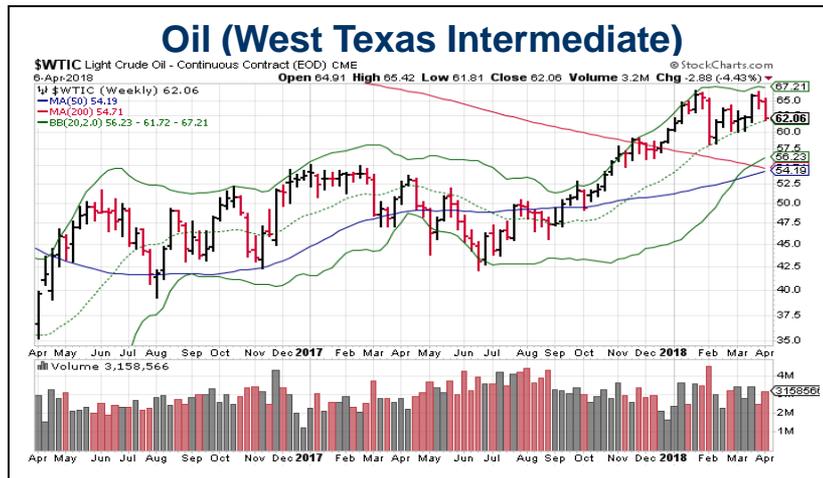
Structure

- Multi-Asset portfolios are now more in line with their benchmarks, after having been slightly underweight non-US. Within the international holdings, the Eurozone is still favored, but we have recently added to our representation in emerging markets. We maintain positions in small-cap companies that are leveraged to improving economic conditions in developed markets.

Outlook

- We think international markets offer both diversification and risk-management benefits for Multi-Asset investors. Valuations remain below U.S. levels, which limits downside risk. These are long-term investments that may take time to play out fully.

MARKET MONITOR – OTHER ASSET CLASSES



- Following a sustained upward move over the past seven months, the price of oil has settled into a trading range. We continue to think that WTI will stabilize in the \$50 to \$60 range, slightly below current levels.
- Driving the rally in oil were multiple factors, including OPEC extending its production cuts, deterioration of Venezuela's output, and a pickup in demand driven by the growing global expansion. These conditions remain in place.
- The dollar has given up most of its 2014-2016 gains, hitting multi-year lows despite rising interest rates. This has helped commodities and precious metals prices. Even so, recent inflation data has remained tame, so the Fed is unlikely to accelerate its tightening program; this should keep a lid on the dollar.
- Returns from alternative asset classes have been unimpressive, especially as some recent IPO flops have hurt venture capital valuations.

FF 92 of 125

OTHER ASSET CLASSES STRATEGY REVIEW

Strategy

- As the Fed transitions toward a less accommodative policy, we believe that traditional hedges against inflation and currency devaluation – such as precious metals and industrial commodities – will be less appealing to investors. We do not hold assets in these areas.
- We do not recommend “alternative” asset classes such as hedge funds, private equity, or venture capital. Historical returns have been lackluster, funds are overcapitalized, and fees remain too high, even for the so-called “liquid alternatives” that package such assets into mutual funds.

Outlook

- Rising U.S. interest rates are a major concern for alternative assets: They reduce the incentive to own commodities or precious metals, they undercut the profitability of debt-financed hedge funds and private equity, and they limit the prices that investors will pay for real estate. Such an environment may dampen investor interest in alternative asset classes.

APPENDIX

SRI MULTI ASSET PORTFOLIO HOLDINGS (AS OF 3/31/2018)

Portfolio Weightings vs SRI/Blend

	% Of Portfolio	% Of SRI CORE	% Of Blend*		% Of Portfolio	% Of SRI CORE	% Of Blend*
Industry Weightings				Industry Weightings			
CONSUMER DISCRETIONARY	8.81%	13.20%	12.46%	HEALTH CARE	9.62%	14.27%	12.49%
MCDONALD'S	1.06%	1.59%		ABBVIE	1.08%	1.62%	
THE HOME DEPOT, INC.	1.52%	2.29%		BECTON DICKINSON	1.46%	2.19%	
AMAZON.COM, INC.	2.56%	3.83%		DANAHER	1.27%	1.90%	
NIKE, INC.	1.26%	1.88%		MERCK & CO., INC.	1.42%	2.13%	
ROYAL CARIBBEAN CRUISES	1.18%	1.77%		JOHNSON & JOHNSON	1.50%	2.26%	
COMCAST CORPORATION	1.23%	1.84%		UNITEDHEALTH GROUP	1.41%	2.10%	
				ABBOTT LABS	1.48%	2.07%	
CONSUMER STAPLES	5.67%	8.49%	7.92%	INDUSTRIALS	7.48%	11.22%	10.43%
COSTCO WHOLESALE CORP.	1.31%	1.96%		CATERPILLAR	1.20%	1.81%	
CVS HEALTH CORP.	1.15%	1.72%		FEDEX CORP	1.33%	1.99%	
MONSTER BEVERAGE	1.22%	1.82%		EATON CORP	1.16%	1.75%	
PROCTER & GAMBLE CO	0.91%	1.37%		3M CO.	1.31%	1.96%	
SYSCO CORP	1.08%	1.62%		MASCO CORP.	1.02%	1.53%	
				NORTHROP GRUMMAN	1.46%	2.18%	
ETF/MUTUAL FUNDS	33.31%			INFORMATION TECH	17.35%	25.95%	22.36%
DOMINI INT'L SOCIAL EQUITY FUND	4.98%			VISA INC	1.74%	2.61%	
GUGGENHEIM SOLAR ETF	1.98%			SALESFORCE.COM, INC.	1.86%	2.79%	
FINANCIAL SPDR FUND	1.98%			ALPHABET INC. CLASS A	1.95%	2.93%	
POWERSHARES WILDERHILL	2.05%			ALPHABET INC. CLASS C	0.72%	1.08%	
INDUSTRIAL SPDR FUND	1.95%			ANALOG DEVICES, INC.	1.14%	1.70%	
CALVERT INT'L OPP FUND	3.10%			APPLE INC	2.38%	3.55%	
CALVERT GLOBAL WATER	1.99%			FACEBOOK, INC.	2.14%	3.20%	
CALVERT EMERGING MARKETS	5.15%			ADOBE SYSTEMS INC.	1.74%	2.60%	
CALVERT SMALL CAP FUND	3.13%			BROADCOM	1.05%	1.57%	
CALVERT GLOBAL ENERGY	1.98%			INTUIT INC	1.56%	2.33%	
DFA INTERNATIONAL SUSTAINABILI	5.02%			COGNIZANT TECHNOLOGY	1.07%	1.59%	
				MATERIALS	2.19%	3.29%	3.76%
FINANCIALS	11.27%	16.88%	16.23%	PPG INDUSTRIES, INC.	0.92%	1.39%	
ALLSTATE CORP	1.28%	1.92%		DOWDUPONT	1.27%	1.90%	
BANK OF AMERICA CORP.	2.20%	3.29%					
BLACKROCK, INC.	1.46%	2.19%		TELECOMMUNICATION	1.68%	2.52%	2.30%
JPMORGAN CHASE & CO	2.24%	3.35%		VERIZON COMMUNICATIONS	1.68%	2.52%	
MORGAN STANLEY	1.50%	2.25%					
PNC FINANCIAL	1.14%	1.71%		UTILITIES	2.04%	3.04%	2.85%
SCHWAB CORP	1.45%	2.17%		XCEL ENERGY INC	1.22%	1.82%	
CASH	0.56%	1.13%	0.41%				
U.S. DOLLAR	0.56%	1.13%					

Target allocation as of 3/31/2018; Allocation may not reflect EWM's current view and should not be used as the base of an investment decision.

Securities listed are not to be considered as a recommendation to buy or sell and are not guaranteed to be in portfolios. *Benchmark is a blend of 60% S&P 500 and 40% MSCI ACWI

MICHAEL A. TYLER, CFA®

Chief Investment Officer, Eastern Bank Wealth Management

Michael Tyler sets investment policies and structures asset allocation strategies for client portfolios. As the primary spokesman for the firm's investment services, Michael develops and disseminates economic and financial market viewpoints. He is also responsible for selecting and overseeing providers of investment services.

Professional Experience

Prior to joining Eastern Bank Wealth Management in 2012, Michael charted a successful career at both institutional and boutique investment firms. He was a partner, equity analyst, and portfolio manager at Wellington Management Company LLP in Boston, where he built the firm's global telecom investment practice. Michael then founded West Shore Investment Management LLC, an independent investment advisor and strategic consultant, where he raised investment capital and launched an equity long/short hedge fund.

Michael is currently chair of the independent investment committee of Align Impact LLC, a specialized impact consultant that helps wealth managers and their clients define their most important values and desired social outcomes and implement them through their investment portfolios. He is also a member of the Board of Economic Advisors of the Associated Industries of Massachusetts, the state's largest trade group.

Education

Michael holds a MBA with highest honors from Harvard Business School and a BA with honors from Princeton University. He is a Chartered Financial Analyst. Michael has served on the board of Congregation Sha'ar Zahav in San Francisco, where he co-edited and published the first complete LGBT-themed Jewish prayer book.



FF 96 of 125

JOHN F. DOHERTY, CFP®, CTFA

Vice President, Eastern Bank Wealth Management

John F. Doherty has over 25 years of experience working with individuals, families and organizations, helping them to grow and protect their wealth through trusts, investment management accounts, IRAs and charitable accounts.

Professional Experience

Mr. Doherty joined Eastern Bank Wealth Management in 2006 after a career spanning 20 years at BankBoston, Fleet National Bank and Bank of America. Prior to joining Eastern Bank, he was a vice president and relationship manager in the Private Bank at Bank of America, managing the trust, investment, banking and credit needs of high net-worth individuals.

Education / Service

Mr. Doherty is a Certified Financial Planner™ practitioner and a Certified Trust and Financial Advisor. He holds a Bachelor of Science in Finance from Suffolk University and an MBA from Bentley University. He is a graduate of the National Graduate Trust School at Northwestern University and received his certification in financial planning from Boston University's Center for Professional Education. Mr. Doherty is a member of the Essex County Estate Planning Council and serves on the Board of Directors of the Lynn Home for Women. He is also active in a number of youth activities in the city of Melrose.



NOTICES AND DISCLOSURE

Investment Products: *Not insured by FDIC or any federal government agency. Not deposits of or guaranteed by any bank. May lose value.*

Eastern Bank Wealth Management is a division of Eastern Bank. Views are as of the date above and are subject to change based on market conditions and other factors. This material is for your private information and we are not soliciting any action based on it. All material has been obtained from sources believed to be reliable but its accuracy is not guaranteed. There is neither representation nor warranty as to the accuracy of, nor liability for the decisions based on such information.

Opinions expressed are our current opinions as of the date appearing on this material only. All opinions herein are subject to change without notice.

Past performance does not guarantee future performance. Investments made through Eastern Bank Wealth Management are not insured by FDIC or any federal government agency, are not deposits of or guaranteed by any bank, and may lose value.

Join Us For Good

GOOD INVESTS. **GOOD** ADVISES. **GOOD** LENDS. **GOOD** HELPS FEED HUNGRY KIDS. **GOOD** FULES THE HUNGRY STARTUP. **GOOD** HELPS KIDS LEARN TO PAINT. AND DANCE. AND REALIZE HOW SPECIAL THEY ARE. **GOOD** BUILDS BUSINESS. **GOOD** BUILDS PLAYGROUNDS. AND REBUILDS LIVES. **GOOD** INSURES. **GOOD** ENDURES. **GOOD** FIGHTS DISCRIMINATION. **GOOD** STANDS UP FOR EQUAL OPPORTUNITY. **GOOD** INNOVATES. **GOOD** EDUCATES. **GOOD** ADVOCATES. **GOOD** HELPS PEOPLE BEAT ADDICTIONS. **GOOD** PAYS CLOSE ATTENTION. **GOOD** PAYS IT FORWARD.

Investment Review

Account Name	SALEM STATE	Account Number	2427524
		Assets Held As Of	MAR 31, 2018
		Valued As Of	MAR 31, 2018

Important Information

GAINS TAXED TO.....	EXEMPT	INCOME TAXED TO.....	EXEMPT
TRUST TAX YEAR END.....		TRUST TAX FILING STATUS.....	AGENCY
LONG TERM CARRYOVER LOSS....		SHORT TERM CARRYOVER LOSS...	
OFFICER.....	JOHN DOHERTY	INVESTMENT OBJECTIVE.....	GROWTH WITH INCOME
REVOCABILITY.....		INVESTMENT AUTHORITY.....	SOLE
FINAL TERMINATION DATE.....		DATE OF DEATH.....	
		TRUST SITUS.....	MASSACHUSETTS

TRUSTEE RESTRICTIONS:

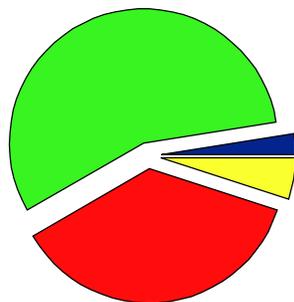
REMARKS:

RECOMMENDED CHANGES:

SECURITY	PRICE	VALUE	COST	INCOME	EST INCOME CHANGE:
					EST GAIN/LOSS:
					RATIONALE FOR
					RECOMMENDATION:

SUMMARY OF INVESTMENTS

Investment Allocation



2.6%	■	CASH ITEMS	368,246.60
55.8%	■	EQUITIES	7,967,739.87
36.7%	■	FIXED INCOME SECURITIES	5,237,502.44
4.9%	■	MUTUAL FUNDS	696,354.85
<hr/>			
100.0%		Total	14,269,843.76

Investment Review

Account Name	SALEM STATE	Account Number	2427524
		Assets Held As Of	MAR 31, 2018
		Valued As Of	MAR 31, 2018

SUMMARY OF INVESTMENTS

Investment Summary

	Market Value	%	Estimated Income	Current Yield
CASH ITEMS				
PRINCIPAL CASH				
MONEY MARKET FUNDS	368,246.60	2.58	3,977	1.08
TOTAL CASH ITEMS	368,246.60	2.58	3,977	1.08
FIXED INCOME SECURITIES				
MUTUAL FUND - GOV. BONDS MUTUAL FUNDS	302,759.46	2.12	5,704	1.88
CORPORATE/OTHER BONDS	4,006,758.50	28.08	136,482	3.41
MUTUAL FUND - FIXED INCOME MUTUAL FUNDS	732,871.65	5.14	25,316	3.45
MUTUAL FUND - SHORT TERM FIXED INCOME MUTUAL FUNDS	195,112.83	1.37	3,011	1.54
TOTAL FIXED INCOME SECURITIES	5,237,502.44	36.70	170,513	3.26
EQUITIES				
COMMON STOCKS				
CONSUMER DISCRETIONARY	763,732.16	5.35	11,282	1.48
CONSUMER STAPLES	494,331.05	3.46	9,436	1.91
FINANCIALS	965,497.31	6.77	16,992	1.76
HEALTH CARE	823,400.41	5.77	17,858	2.17
INDUSTRIALS	655,360.88	4.59	11,918	1.82
INFORMATION TECHNOLOGY	1,527,035.17	10.70	8,388	0.55
MATERIALS	195,749.21	1.37	4,029	2.06
TELECOMMUNICATION SERVICES	148,481.10	1.04	7,328	4.94
UTILITIES	183,152.77	1.28	5,668	3.09
TOTAL COMMON STOCKS	5,756,740.06	40.34	92,899	1.61
MUTUAL FUND - LARGE CAP EQUITIES MUTUAL FUNDS	341,458.61	2.39	5,752	1.68
MUTUAL FUND - INTERNATIONAL EQUITIES MUTUAL FUNDS	1,143,375.42	8.01	27,423	2.40
MUTUAL FUND-SMALL AND MID CAP EQUITIES MUTUAL FUNDS	273,647.22	1.92	822	0.30

Investment Review

Account Name	SALEM STATE	Account Number	2427524
		Assets Held As Of	MAR 31, 2018
		Valued As Of	MAR 31, 2018

SUMMARY OF INVESTMENTS

Investment Summary

	Market Value	%	Estimated Income	Current Yield
MUTUAL FUND - INTERNATIONAL EMERGING MKTS MUTUAL FUNDS	452,518.56	3.17	1,186	0.26
TOTAL EQUITIES	7,967,739.87	55.84	128,082	1.61
MUTUAL FUNDS				
MUTUAL FUNDS MUTUAL FUNDS	696,354.85	4.88	10,115	1.45
TOTAL FUND	14,269,843.76	100.00	312,687	2.19

For the Tax Year Ending 12/31

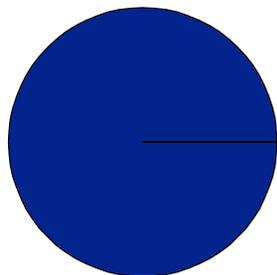
Net Short Term Gain/Loss 141,680.21

Net Long Term Gain/Loss * 861,279.99

* Includes Long Term Capital Gains Dividends

SUMMARY OF INVESTED INCOME

Investment Allocation



100.0%		CASH ITEMS	1,197.00
<hr/>			
100.0%		Total	1,197.00

Investment Review

Account Name SALEM STATE

Account Number 2427524
Assets Held As Of MAR 31, 2018
Valued As Of MAR 31, 2018**SUMMARY OF INVESTED INCOME****Investment Summary**

	Market Value	%	Estimated Income	Current Yield
CASH ITEMS				
INCOME CASH	1,197.00	100.00	0	0.00
TOTAL FUND	1,197.00	100.00	0	0.00

SCHEDULE OF INVESTMENTS

UNITS	DESCRIPTION	TAX COST	UNIT COST	CURRENT PRICE	MARKET VALUE	INC RATE	EST INC	CURRENT YIELD	PLG COD
CASH ITEMS									
	PRINCIPAL CASH	0			0			0.0	
MONEY MARKET FUNDS									
	FEDERATED GOV'T OBLIGATION TAX MANAGED FUND # 637	368,247			368,247	1.08	3,977	1.1	
	TOTAL CASH ITEMS	368,247			368,247		3,977	1.1	
FIXED INCOME SECURITIES									
MUTUAL FUND - GOV. BONDS									
MUTUAL FUNDS									
2,934	1 SHARES BARCLAYS 7-10 YR TREAS	311,646	106.22	103.19	302,759	1.94	5,704	1.9	
CORPORATE/OTHER BONDS									
100,000	WELLS FARGO & CO 2.15% 01/15/2019	100,128	100.13	99.56	99,560	2.15	2,150	2.2	
125,000	DEUTSCHE BANK AG LONDON 2.5% 02/13/2019	125,255	100.20	99.598	124,498	2.50	3,125	2.5	
150,000	E M C CORP 2.65% 06/01/2020	150,728	100.49	96.425	144,638	2.65	3,975	2.7	
200,000	AUTODESK, INC. 3.125% 06/15/2020	204,912	102.46	100.101	200,202	3.13	6,250	3.1	
100,000	WELLS FARGO & CO 3% 01/22/2021	102,552	102.55	99.501	99,501	3.00	3,000	3.0	

Investment Review

Account Name SALEM STATE

Account Number 2427524
Assets Held As Of MAR 31, 2018
Valued As Of MAR 31, 2018**SCHEDULE OF INVESTMENTS**

UNITS	DESCRIPTION	TAX COST	UNIT COST	CURRENT PRICE	MARKET VALUE	INC RATE	EST INC	CURRENT YIELD	PLG COD
200,000	XILINX, INC. 3% 03/15/2021	201,060	100.53	99.613	199,226	3.00	6,000	3.0	
200,000	MONSANTO CO 2.75% 07/15/2021	199,600	99.80	98.636	197,272	2.75	5,500	2.8	
250,000	EBAY INC 3.8% 03/09/2022	257,297	102.92	101.505	253,763	3.80	9,500	3.7	
125,000	TIME WARNER INC 3.4% 06/15/2022	131,415	105.13	99.713	124,641	3.40	4,250	3.4	
200,000	CVS 3.5% 07/20/2022	204,771	102.39	99.785	199,570	3.50	7,000	3.5	
250,000	HEWLETT-PACKARD CO 4.05% 09/15/2022	259,251	103.70	103.105	257,763	4.05	10,125	3.9	
200,000	FORD MOTOR CREDIT CO 4.25% 09/20/2022	206,216	103.11	101.551	203,102	4.25	8,500	4.2	
100,000	BANK OF AMERICA CORP 3.3% 01/11/2023	102,472	102.47	99.708	99,708	3.30	3,300	3.3	
225,000	A T & T INC 3.6% 02/17/2023	228,565	101.58	100.597	226,343	3.60	8,100	3.6	
150,000	VODAFONE GROUP 2.95% 02/19/2023	152,872	101.91	97.34	146,010	2.95	4,425	3.0	
150,000	CITIGROUP 3.375% 03/01/2023	155,270	103.51	99.09	148,635	3.38	5,063	3.4	
100,000	ACE INA HOLDINGS 2.7% 03/13/2023	102,541	102.54	97.44	97,440	2.70	2,700	2.8	
150,000	CARDINAL HEALTH, INC. 3.2% 03/15/2023	155,464	103.64	98.483	147,725	3.20	4,800	3.2	
125,000	HYATT HOTELS CORP 3.375% 07/15/2023	128,012	102.41	99.073	123,841	3.38	4,219	3.4	
200,000	CELGENE CORPORATION 4% 08/15/2023	207,132	103.57	101.659	203,318	4.00	8,000	3.9	
175,000	AMERIPRISE FINANCIAL INC 4% 10/15/2023	181,509	103.72	103.497	181,120	4.00	7,000	3.9	
200,000	WHIRLPOOL CORP. 4% 03/01/2024	209,603	104.80	102.602	205,204	4.00	8,000	3.9	
175,000	CSX CORPORATION 3.4% 08/01/2024	179,976	102.84	99.78	174,615	3.40	5,950	3.4	
150,000	CBS 3.7% 08/15/2024	153,694	102.46	99.377	149,066	3.70	5,550	3.7	
	TOTAL CORPORATE/OTHER BONDS	4,100,295			4,006,761		136,482	3.4	

Investment Review

Account Name SALEM STATE

Account Number 2427524
Assets Held As Of MAR 31, 2018
Valued As Of MAR 31, 2018**SCHEDULE OF INVESTMENTS**

UNITS	DESCRIPTION	TAX COST	UNIT COST	CURRENT PRICE	MARKET VALUE	INC RATE	EST CURRENT INC	YIELD	PLG COD
MUTUAL FUND - FIXED INCOME									
MUTUAL FUNDS									
15,485.75	CALVERT INCOME FUND	255,979	16.53	16.22	251,179	0.54	8,347	3.3	
2,482	I SHARES TIPS BOND ETF	284,170	114.49	113.05	280,590	2.39	5,925	2.1	
30,424	PAX WORLD HIGH YIELD BOND-I	206,275	6.78	6.61	201,103	0.36	11,044	5.5	
	TOTAL MUTUAL FUNDS	746,424			732,872		25,316	3.5	
MUTUAL FUND - SHORT TERM FIXED INCOME									
MUTUAL FUNDS									
3,831	ISHARES FLOATING RATE BOND ETF	194,551	50.78	50.93	195,113	0.79	3,011	1.5	
	TOTAL FIXED INCOME SECURITIES	5,352,916			5,237,505		170,513	3.3	
EQUITIES									
COMMON STOCKS									
CONSUMER DISCRETIONARY									
150	AMAZON.COM, INC	126,003	840.02	1447.34	217,101	0.00	0	0.0	
3,086	COMCAST CORP NEW CL A	100,819	32.67	34.17	105,449	0.76	2,345	2.2	
745	HOME DEPOT INC	58,653	78.73	178.24	132,789	4.12	3,069	2.3	
606	MCDONALD'S CORP	95,992	158.40	156.38	94,766	4.04	2,448	2.6	
1,686	NIKE INC. CL B	103,460	61.36	66.44	112,018	0.80	1,349	1.2	
863	ROYAL CARIBBEAN CRUISES, LTD.	70,040	81.16	117.74	101,610	2.40	2,071	2.0	
	TOTAL CONSUMER DISCRETIONARY	554,967			763,733		11,282	1.5	
CONSUMER STAPLES									
1,568	CVS HEALTH CORPORATION	123,249	78.60	62.21	97,545	2.00	3,136	3.2	
591	COSTCO WHOLESALE CORP, NEW	65,888	111.49	188.43	111,362	2.00	1,182	1.1	
1,904	MONSTER BEVERAGE CORP	94,333	49.54	57.21	108,928	0.00	0	0.0	
1,029	PROCTER & GAMBLE CO	69,876	67.91	79.28	81,579	2.76	2,838	3.5	

Investment Review

Account Name SALEM STATE

Account Number 2427524
Assets Held As Of MAR 31, 2018
Valued As Of MAR 31, 2018**SCHEDULE OF INVESTMENTS**

UNITS	DESCRIPTION	TAX COST	UNIT COST	CURRENT PRICE	MARKET VALUE	INC RATE	EST INC	CURRENT YIELD	PLG COD
1,583	SYSCO CORP	82,438	52.08	59.96	94,917	1.44	2,280	2.4	
	TOTAL CONSUMER STAPLES	435,784			494,331		9,436	1.9	
	FINANCIALS								
1,179	ALLSTATE CORP	78,202	66.33	94.80	111,769	1.84	2,169	1.9	
6,275	BANK AMERICA CORP	95,711	15.25	29.99	188,187	0.48	3,012	1.6	
229	BLACKROCK INC.	84,286	368.06	541.72	124,054	11.52	2,638	2.1	
1,746	J P MORGAN CHASE & CO	114,244	65.43	109.97	192,008	2.24	3,911	2.0	
2,397	MORGAN STANLEY	44,011	18.36	53.96	129,342	1.00	2,397	1.9	
640	PNC BANK CORP	96,675	151.05	151.24	96,794	3.00	1,920	2.0	
2,362	CHARLES SCHWAB	100,957	42.74	52.22	123,344	0.40	945	0.8	
	TOTAL FINANCIALS	614,086			965,498		16,992	1.8	
	HEALTH CARE								
2,038	ABBOTT LABORATORIES INC	124,266	60.97	59.92	122,117	1.12	2,283	1.9	
1,020	ABBVIE INC	115,342	113.08	94.65	96,543	3.84	3,917	4.1	
592	BECTON DICKINSON CO	65,596	110.80	216.70	128,286	3.00	1,776	1.4	
1,137	DANAHER CORP	97,955	86.15	97.91	111,324	0.64	728	0.7	
1,021	JOHNSON & JOHNSON	80,244	78.59	128.15	130,841	3.36	3,431	2.6	
2,109	MERCK & CO INC. NEW	92,032	43.64	54.47	114,877	1.92	4,049	3.5	
558	UNITEDHEALTH GROUP, INC.	124,886	223.81	214.00	119,412	3.00	1,674	1.4	
	TOTAL HEALTH CARE	700,321			823,400		17,858	2.2	
	INDUSTRIALS								
711	CATERPILLAR INC.	97,169	136.66	147.38	104,787	3.12	2,218	2.1	
486	FEDEX CORPORATION	46,877	96.45	240.11	116,693	2.00	972	0.8	
2,241	MASCO CORP	47,311	21.11	40.44	90,626	0.42	941	1.0	
366	NORTHROP GRUMMAN	111,597	304.91	349.12	127,778	4.40	1,610	1.3	

Investment Review

Account Name SALEM STATE

Account Number 2427524
Assets Held As Of MAR 31, 2018
Valued As Of MAR 31, 2018**SCHEDULE OF INVESTMENTS**

UNITS	DESCRIPTION	TAX COST	UNIT COST	CURRENT PRICE	MARKET VALUE	INC RATE	EST INC	CURRENT YIELD	PLG COD
520	3M CO	125,567	241.48	219.52	114,150	5.44	2,829	2.5	
1,268	EATON CORP PLC	101,874	80.34	79.91	101,326	2.64	3,348	3.3	
	TOTAL INDUSTRIALS	530,395			655,360		11,918	1.8	
	INFORMATION TECHNOLOGY								
684	ADOBE SYSTEMS INC.	74,235	108.53	216.08	147,799	0.00	0	0.0	
61	ALPHABET, INC. CL C	20,896	342.55	1031.79	62,939	0.00	0	0.0	
164	ALPHABET, INC. CL A	71,731	437.38	1037.14	170,091	0.00	0	0.0	
1,083	ANALOG DEVICES	53,934	49.80	91.13	98,694	1.92	2,079	2.1	
1,580	APPLE	149,505	94.62	167.78	265,092	2.52	3,982	1.5	2
1,044	FACEBOOK CL A	113,469	108.69	159.79	166,821	0.00	0	0.0	
807	INTUIT	131,925	163.48	173.35	139,893	1.56	1,259	0.9	
2,094	PAYPAL HLDGS INC	73,713	35.20	75.87	158,872	0.00	0	0.0	2
1,417	SALESFORCE.COM	81,281	57.36	116.30	164,797	0.00	0	0.0	
1,271	VISA, INC	44,811	35.26	119.62	152,037	0.84	1,068	0.7	
	TOTAL INFORMATION TECHNOLOGY	815,500			1,527,035		8,388	0.5	
	MATERIALS								
1,771	DOWDUPONT INC.	96,308	54.38	63.71	112,830	1.52	2,692	2.4	
743	P P G INDUSTRIES	77,434	104.22	111.60	82,919	1.80	1,337	1.6	
	TOTAL MATERIALS	173,742			195,749		4,029	2.1	
	TELECOMMUNICATION SERVICES								
3,105	VERIZON COMMUNICATIONS INC	126,555	40.76	47.82	148,481	2.36	7,328	4.9	
	UTILITIES								
445	NEXTERA ENERGY INC	63,183	141.99	163.33	72,682	4.44	1,976	2.7	
2,429	XCEL ENERGY, INC.	65,259	26.87	45.48	110,471	1.52	3,692	3.3	

Investment Review

Account Name SALEM STATE

Account Number 2427524
Assets Held As Of MAR 31, 2018
Valued As Of MAR 31, 2018**SCHEDULE OF INVESTMENTS**

UNITS	DESCRIPTION	TAX COST	UNIT COST	CURRENT PRICE	MARKET VALUE	INC RATE	EST INC	CURRENT YIELD	PLG COD
	TOTAL UTILITIES	128,442			183,153		5,668	3.1	
	TOTAL COMMON STOCKS	4,079,792			5,756,740		92,899	1.6	
	MUTUAL FUND - LARGE CAP EQUITIES								
	MUTUAL FUNDS								
6,228	SPDR FINANCIAL INDEX	146,669	23.55	27.57	171,706	0.43	2,672	1.6	
2,285	SPDR INDUSTRIAL SELECT	145,341	63.61	74.29	169,753	1.35	3,080	1.8	
	TOTAL MUTUAL FUNDS	292,010			341,459		5,752	1.7	
	MUTUAL FUND - INTERNATIONAL EQUITIES								
	MUTUAL FUNDS								
14,551.86	CALVERT INTERNATIONAL OPPORTUNITIES FUND	195,811	13.46	18.55	269,937	0.33	4,802	1.8	
39,873	DFA INTERNATIONAL SUSTAINABILITY CORE	452,381	11.35	10.99	438,204	0.24	9,490	2.2	
49,179	DOMINI IMPACT INTERNATIONAL EQUITY FUND INSTITUTIONAL	454,169	9.24	8.85	435,234	0.27	13,131	3.0	
	TOTAL MUTUAL FUNDS	1,102,361			1,143,375		27,423	2.4	
	MUTUAL FUND-SMALL AND MID CAP EQUITIES								
	MUTUAL FUNDS								
10,681	CALVERT SMALL CAP FUND	278,143	26.04	25.62	273,647	0.08	822	0.3	
	MUTUAL FUND - INTERNATIONAL EMERGING MKTS								
	MUTUAL FUNDS								
25,224	CALVERT EMERGING MARKETS EQUITY FUND	455,077	18.04	17.94	452,519	0.05	1,186	0.3	
	TOTAL EQUITIES	6,207,383			7,967,740		128,082	1.6	
	MUTUAL FUNDS								

Investment Review

Account Name SALEM STATE

Account Number 2427524
Assets Held As Of MAR 31, 2018
Valued As Of MAR 31, 2018**SCHEDULE OF INVESTMENTS**

UNITS	DESCRIPTION	TAX COST	UNIT COST	CURRENT PRICE	MARKET VALUE	INC RATE	EST CURRENT INC	YIELD	PLG COD
	MUTUAL FUNDS								
	MUTUAL FUNDS								
8,685	CALVERT GLOBAL WATER FUND	181,007	20.84	20.01	173,787	0.27	2,362	1.4	
23,036	CALVERT GLOBAL ENERGY SOLUTIONS	179,545	7.79	7.41	170,697	0.11	2,442	1.4	
7,054	GUGGENHEIM SOLAR ETF	183,262	25.98	24.56	173,246	0.45	3,139	1.8	
7,145	POWERSHARES WILDERHILL CLEAN ENERGY	183,071	25.62	25.00	178,625	0.30	2,172	1.2	
	TOTAL MUTUAL FUNDS	726,885			696,355		10,115	1.5	
	TOTAL FUND	12,655,431			14,269,847		312,687	2.2	

SCHEDULE OF INCOME INVESTMENTS

UNITS	DESCRIPTION	TAX COST	UNIT COST	CURRENT PRICE	MARKET VALUE	INC RATE	EST CURRENT INC	YIELD	PLG COD
	INCOME CASH	1,197			1,197			0.0	

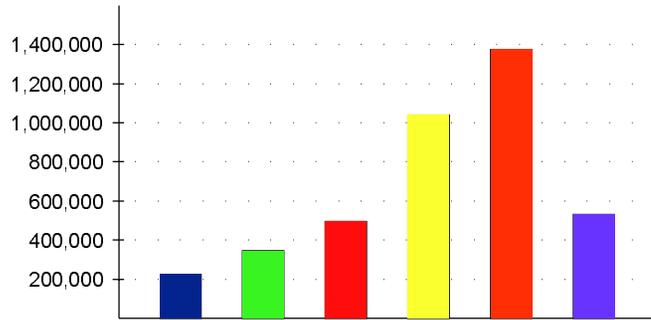
Investment Review

Account Name SALEM STATE

Account Number 2427524
 Assets Held As Of MAR 31, 2018
 Valued As Of MAR 31, 2018

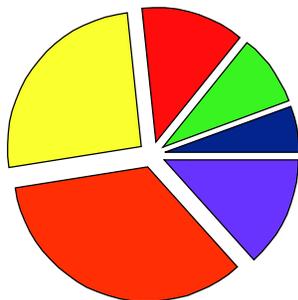
MATURITY SCHEDULE

Maturities by Year



2019	224,057.50
2020	344,839.50
2021	495,999.00
2022	1,038,838.25
2023	1,374,139.75
2024	528,884.50
Total	4,006,758.50

Percent at Market by Year



5.6%	2019	224,057.50
8.6%	2020	344,839.50
12.4%	2021	495,999.00
25.9%	2022	1,038,838.25
34.3%	2023	1,374,139.75
13.2%	2024	528,884.50
100.0%	Total	4,006,758.50

Investment Review

Account Name SALEM STATE

Account Number 2427524
Assets Held As Of MAR 31, 2018
Valued As Of MAR 31, 2018**MATURITY SCHEDULE**

Maturing :	Federal Tax Cost	Current Market Value	Face Value	% at Market
2018				
2019	225,383.62	224,057.50	225,000.00	5.59
2020	355,639.97	344,839.50	350,000.00	8.61
2021	503,212.08	495,999.00	500,000.00	12.38
2022	1,058,950.03	1,038,838.25	1,025,000.00	25.93
2023	1,413,838.96	1,374,139.75	1,375,000.00	34.30
2024	543,273.42	528,884.50	525,000.00	13.20
2025				
2026				
2027				
TEN TO TWENTY YEARS				
OVER TWENTY YEARS				
TOTAL	4,100,298.08	4,006,758.50	4,000,000.00	100.00
MATURING NEXT 365 DAYS	225,383.62	224,057.50	225,000.00	5.59

Information may be a combination of maturity and prerefunded dates

Your Performance Statement

Investment activity through 03/31/2018

Your Portfolio Summary

Reporting period: December 31, 2017 to March 31, 2018

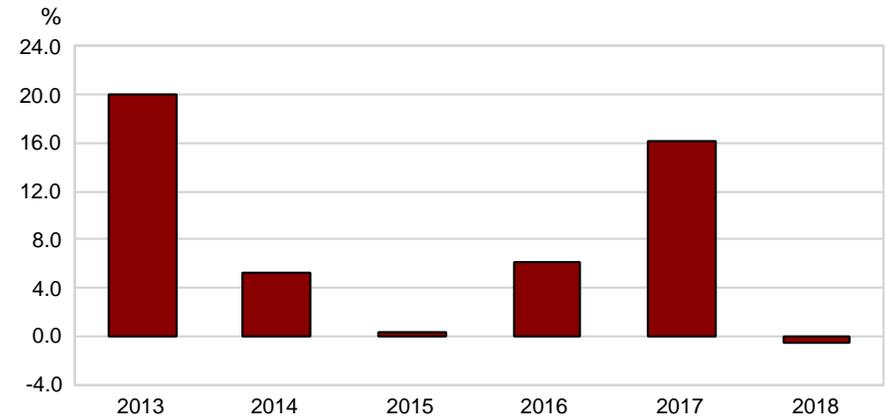
EASTERN BANK INVEST MGR FOR SALEM STATE UNIV (2427524)

Performance Measured Since: December 01, 1996

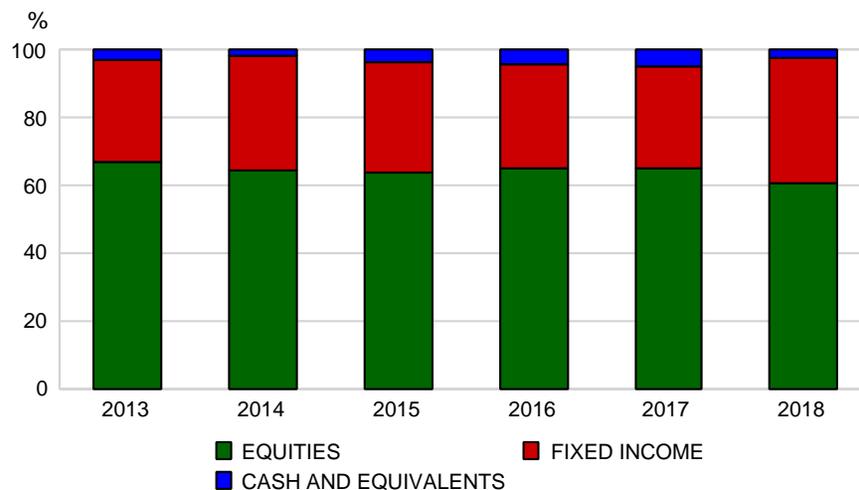
Portfolio Value - YTD

Beginning portfolio value	14,387,694.62
Contributions	.00
Income earned	79,039.70
Withdrawals	-16,240.43
Market Appreciation	-153,781.70
Ending portfolio value	14,296,712.19
Total return	-0.52

Annual Portfolio Returns



Annual Portfolio Allocation



Portfolio Values By Asset Class

	Market value	% of Mkt val
DOMESTIC EQUITY	7,084,077	49.6
DOMESTIC FIXED INCOM	5,257,981	36.8
INTERNATIONAL EQUITY	1,595,894	11.2
CASH AND EQUIVALENTS	358,760	2.5
Total	14,296,712	100.0

Your Portfolio Performance

Reporting period: December 31, 2017 to March 31, 2018

EASTERN BANK INVEST MGR FOR SALEM STATE UNIV (2427524)

Performance Measured Since: December 01, 1996

	Market Value	Month to Date	Quarter to Date (3 Months)	Year to Date (3 Months)	1 Year	3 Years	5 Years	Inception to Date (256 Months)
TOTAL FUND	14,296,712	-1.22	-.52	-.52	10.42	6.25	7.87	6.10
TOTAL NET OF FEES	14,296,712	-1.25	-.63	-.63	9.92	5.77	7.43	5.83
Strategy: Growth with Income (Corp)		-1.37	-.91	-.91	9.08	6.66	7.92	6.85
EQUITIES	8,679,971	-2.13	-.31	-.31	15.91	9.18	11.69	6.85
Benchmark: Multi-Asset Equity Blend		-2.36	-.79	-.79	14.57	9.96	11.90	7.65
DOMESTIC EQUITY	7,084,077	-2.46	-.50	-.50	15.66	10.02		
COMMON STOCK	5,772,616	-2.94	-.47	-.47	15.86	10.43		
DOMESTIC EQUITY FUNDS	1,311,461	-.30	-.68	-.68	14.69	6.79		
ETF - DOMESTIC EQUITY	351,871	1.89	-3.86	-3.86				
ETF - DOMESTIC EQUITY	341,459	-3.42	.73	.73	17.82	8.76		
MUTUAL FUND - DOMESTIC EQUITY	273,647	.87	-1.62	-1.62				
MUTUAL FUND - DOMESTIC EQUITY	344,484	-.19	-4.46	-4.46				
INTERNATIONAL EQUITY	1,595,894	-.64	.51	.51	17.08	5.15		
INTERNATIONAL EQUITY FUNDS	1,595,894	-.64	.51	.51	17.08	5.15		
MUTUAL FUND - INTERNATIONAL EQUITIES	1,143,375	-.80	-1.49	-1.49	25.24	11.72		
MUTUAL FUND - INTERNATIONAL EQUITIES	452,519	-.22	-.56	-.56				
FIXED INCOME	5,257,981	.23	-1.30	-1.30	1.04	1.10	1.27	4.61
Benchmark: Barclays US Interm Credit TR USD		.11	-1.36	-1.36	1.10	1.67	2.06	5.20
DOMESTIC FIXED INCOME	5,257,981	.23	-1.30	-1.30	1.04	1.10		
DOMESTIC BONDS	4,027,237	.14	-1.34	-1.34	.95	1.08		
CORPORATE BOND	4,027,237	.14	-1.34	-1.34	.95	1.09		
DOMESTIC BOND FUNDS	1,230,744	.55	-1.18	-1.18	1.34	1.10		
ETF - GOVERNMENT BONDS	583,350	1.08	-1.38	-1.38	1.05			
CORPORATE BOND FUNDS	647,394	.07	-1.00	-1.00	1.94	2.14		
ETF - CORPORATE BONDS	195,113	-.01	-.07	-.07	1.38	1.96		

Your Portfolio Performance

Reporting period: December 31, 2017 to March 31, 2018

EASTERN BANK INVEST MGR FOR SALEM STATE UNIV (2427524)

Performance Measured Since: December 01, 1996

	Market Value	Month to Date	Quarter to Date (3 Months)	Year to Date (3 Months)	1 Year	3 Years	5 Years	Inception to Date (256 Months)
MUTUAL FUND - CORPORATE BONDS	452,282	.11	-1.40	-1.40	2.45			
CASH AND EQUIVALENTS	358,760	.10	.24	.24	.65	.24	.15	2.11
CASH UNINVESTED	-9,487	.00	.00	.00	.00	.00		
MONEY MARKET FUNDS	368,247	.09	.24	.24	.65	.24		
Benchmark: Lipper Money Mkt Fd IX		.09	.27	.27	.83	.35	.22	2.02

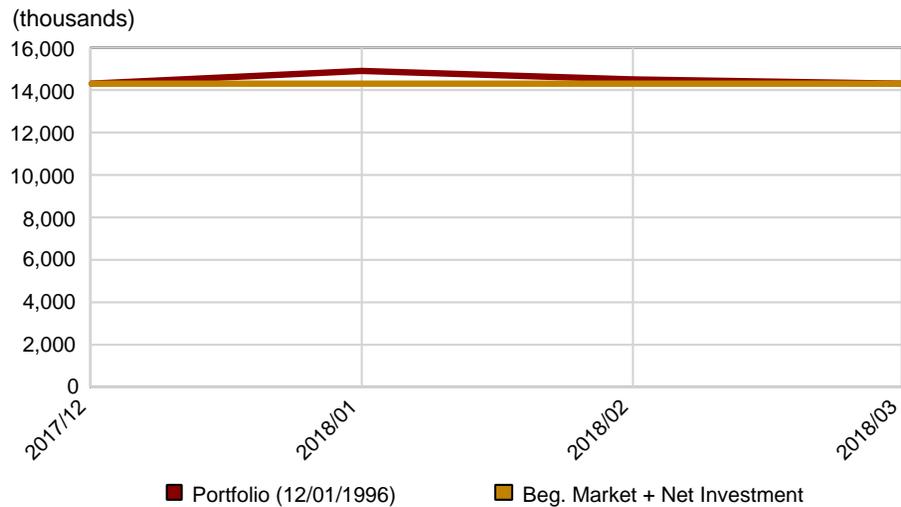
Your Portfolio Performance - Continued

Reporting period: December 31, 2017 to March 31, 2018

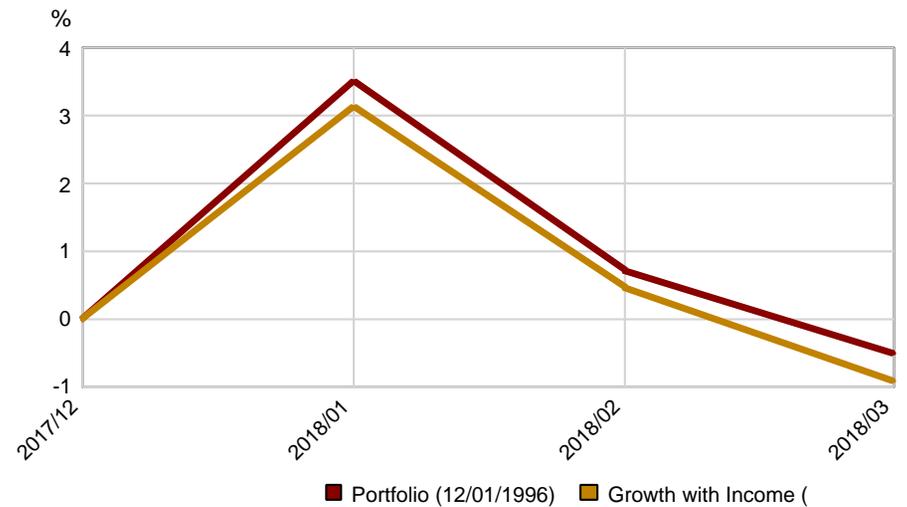
EASTERN BANK INVEST MGR FOR SALEM STATE UNIV (2427524)

Performance Measured Since: December 01, 1996

Portfolio Growth Since Inception - YTD



Cumulative Returns Compared To Benchmark - YTD



Top 10 Performers - YTD

	Market value	% of Mkt val	Return
AMAZON.COM, INC	217,101	1.5	23.90
ADOBE SYSTEMS INC.	147,799	1.0	23.83
SALESFORCE.COM	164,797	1.2	14.13
NORTHROP GRUMMAN	127,778	.9	13.89
I SHARES MSCI RUSSIA ETF	0	.0	7.79
CONOCOPHILLIPS	0	.0	7.44
NIKE INC. CL B	112,355	.8	6.59
HALLIBURTON CO	0	.0	6.50
BLACKROCK INC.	124,054	.9	6.23
INTUIT	139,893	1.0	6.04

Bottom 10 Performers - YTD

	Market value	% of Mkt val	Return
ABBVIE INC	96,543	.7	-16.30
CELGENE CORPORATION	0	.0	-14.80
COMCAST CORP NEW CL A	105,449	.7	-14.35
PROCTER & GAMBLE CO	81,579	.6	-13.08
CVS HEALTH CORPORATION	97,545	.7	-13.01
HOLOGIC	0	.0	-10.46
MONSTER BEVERAGE CORP	108,928	.8	-10.01
DOWDUPONT INC.	112,830	.8	-9.85
ALLSTATE CORP	112,312	.8	-9.19
VERIZON COMMUNICATIONS IN	148,481	1.0	-8.58

Your Allocation Overview

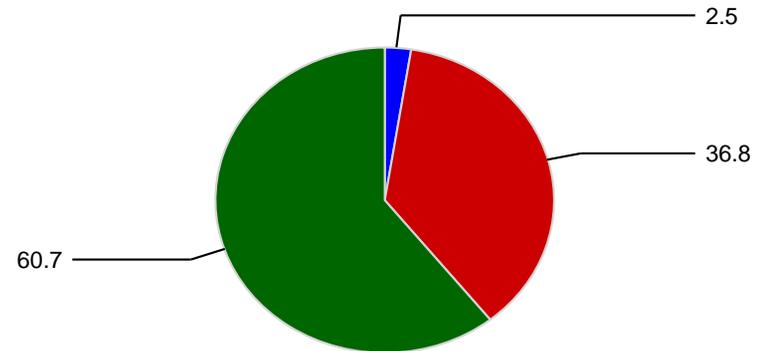
Reporting period: December 31, 2017 to March 31, 2018

EASTERN BANK INVEST MGR FOR SALEM STATE UNIV (2427524)

Performance Measured Since: December 01, 1996

Sector Allocation

	Market value	% of Mkt val
EQUITIES	8,679,971	60.7
FIXED INCOME	5,257,981	36.8
CASH AND EQUIVALENTS	358,760	2.5
Total	14,296,712	100.0



Top Holdings

	Classification	Unit cost	Total cost	Price	Market value	Accrual	% of Mkt val	Unrealized gain loss
CALVERT EMERGING MARKETS EQUIT	MUTUAL FUND - INTERN	18.04	455,077.08	17.940	452,518.56	.00	3.2	-2,558.52
DFA INTERNATIONAL SUSTAINABILI	MUTUAL FUND - INTERN	11.35	452,380.62	10.990	438,204.27	.00	3.1	-14,176.35
DOMINI IMPACT INTERNATIONAL	MUTUAL FUND - INTERN	9.24	454,168.97	8.850	435,234.15	.00	3.0	-18,934.82
FEDERATED GOV'T OBLIGATION TAX	MONEY MARKET FUNDS	1.00	368,246.60	1.000	368,246.60	.00	2.6	.00
I SHARES BARCLAYS 7-10 YR TREA	ETF - GOVERNMENT BON	106.20	311,577.54	103.190	302,759.46	.00	2.1	-8,818.08
I SHARES TIPS BOND ETF	ETF - GOVERNMENT BON	114.49	284,169.84	113.050	280,590.10	.00	2.0	-3,579.74
CALVERT SMALL CAP FUND	MUTUAL FUND - DOMEST	26.04	278,143.09	25.620	273,647.22	.00	1.9	-4,495.87
CALVERT INTERNATIONAL	MUTUAL FUND - INTERN	13.46	195,810.95	18.550	269,937.00	.00	1.9	74,126.05
HEWLETT-PACKARD CO 4.05%	CORPORATE BOND	103.80	259,507.50	103.105	257,762.50	450.00	1.8	-1,745.00
EBAY INC 3.8% 03/09/2022	CORPORATE BOND	103.00	257,500.00	101.505	253,762.50	580.56	1.8	-3,737.50
CALVERT INCOME FUND	MUTUAL FUND - CORPOR	16.53	255,979.49	16.220	251,178.91	.00	1.8	-4,800.58
All Others			9,169,421.55		10,688,634.54	23,205.82	74.9	1,519,212.99
Total			12,741,983.23		14,272,475.81	24,236.38	100.0	1,530,492.58

Your Holdings Detail

Reporting period: December 31, 2017 to March 31, 2018

EASTERN BANK INVEST MGR FOR SALEM STATE UNIV (2427524)

Performance Measured Since: December 01, 1996

Holdings By Asset Class - YTD

ID	Ending Market Value	Average Market Value	Total Return	Average Weight	Total Earnings	Total Port Cont	Total Port Rank	Asset Class Cont	Asset Class Rank	Sector Cont	Sector Rank	
COMMON STOCK												
CONSUMER DISCRETIONARY												
Assets Held During Period												
AMAZON.COM, INC	023135106	217,101	182,018	23.90	1.2	43,506	.30	1	3.93	1	5.35	1
COMCAST CORP NEW CL A	20030N101	105,449	121,304	-14.35	.8	-17,412	-.12	108	-1.57	55	-2.14	7
HOME DEPOT INC	437076102	132,789	137,110	-5.46	.9	-7,491	-.05	93	-.68	43	-.92	6
NIKE INC. CL B	654106103	112,355	107,847	6.59	.7	7,110	.05	13	.64	12	.87	2
ROYAL CARIBBEAN CRUISES, LTD.	V7780T103	102,127	78,188	-.82	.5	-644		51	-.06	32	-.08	4
Assets Purchased During Period												
MCDONALD'S CORP	580135101	94,766	63,987	-.64	.4	-613		49	-.06	30	-.08	3
Assets Sold During Period												
STARBUCKS CORP	855244109	0	63,093	-1.30	.4	-1,229	-.01	59	-.11	34	-.15	5
Total: CONSUMER DISCRETIONARY		764,587	753,548	2.86	4.8	23,226	.16		2.10		2.86	
CONSUMER STAPLES												
Assets Held During Period												
CVS HEALTH CORPORATION	126650100	97,545	108,555	-13.01	.7	-14,128	-.10	104	-1.27	52	-2.71	5
COSTCO WHOLESALE CORP, NEW	22160K105	111,362	142,410	1.09	.9	1,551	.01	35	.14	24	.30	1
MONSTER BEVERAGE CORP	61174X109	108,928	118,932	-10.01	.8	-11,907	-.08	101	-1.07	49	-2.28	3
PROCTER & GAMBLE CO	742718109	81,579	95,053	-13.08	.6	-12,429	-.09	103	-1.12	51	-2.38	4
SYSCO CORP	871829107	94,917	88,222	-.71	.6	-626		50	-.06	31	-.12	2
Total: CONSUMER STAPLES		494,331	553,171	-7.19	3.5	-37,538	-.26		-3.39		-7.19	
ENERGY												
Assets Sold During Period												
CHEVRON CORP	166764100	0	53,081	5.21	.3	8,290	.06	7	.75	7	-30.51	1
CONOCOPHILLIPS	20825C104	0	43,290	7.44	.3	9,663	.07	5	.87	5	-35.57	3
HALLIBURTON CO	406216101	0	47,225	6.50	.3	9,215	.06	6	.83	6	-33.92	2
Total: ENERGY		0	143,596		.9	27,168	.19		2.45		-100.00	
FINANCIALS												
Assets Held During Period												
ALLSTATE CORP	020002101	112,312	124,669	-9.19	.8	-11,459	-.08	100	-1.03	48	-1.00	8
BANK AMERICA CORP	060505104	188,187	234,432	2.30	1.5	5,401	.04	23	.49	16	.47	5
BLACKROCK INC.	09247X101	124,054	128,675	6.23	.8	8,016	.06	11	.72	10	.70	2
J P MORGAN CHASE & CO	46625H100	192,008	220,982	3.64	1.4	8,054	.06	10	.73	9	.70	1
MORGAN STANLEY	617446448	129,342	152,513	3.66	1.0	5,575	.04	22	.50	15	.49	4

Your Holdings Detail

Reporting period: December 31, 2017 to March 31, 2018

EASTERN BANK INVEST MGR FOR SALEM STATE UNIV (2427524)

Performance Measured Since: December 01, 1996

Holdings By Asset Class - YTD

	ID	Ending Market Value	Average Market Value	Total Return	Average Weight	Total Earnings	Total Port Cont	Total Port Rank	Asset Class Cont	Asset Class Rank	Sector Cont	Sector Rank
CHARLES SCHWAB	808513105	123,344	113,000	1.38	.7	1,556	.01	34	.14	23	.14	6
Assets Purchased During Period												
PNC BANK CORP	693475105	96,794	99,948	.60	.6	599		40	.05	26	.05	7
Assets Sold During Period												
WELLS FARGO & CO	949746101	0	51,366	3.92	.3	6,044	.04	20	.55	14	.53	3
Total: FINANCIALS		966,040	1,125,584	2.07	7.2	23,784	.17		2.15		2.07	
HEALTH CARE												
Assets Held During Period												
BECTON DICKINSON CO	075887109	128,286	133,331	1.61	.9	2,147	.01	33	.19	22	.25	2
DANAHER CORP	235851102	111,506	107,835	5.84	.7	6,300	.04	16	.57	13	.72	1
JOHNSON & JOHNSON	478160104	130,841	142,659	-7.38	.9	-10,530	-.07	97	-.95	45	-1.21	7
MERCK & CO INC. NEW	58933Y105	115,890	97,612	-2.02	.6	-1,975	-.01	65	-.18	36	-.23	4
Assets Purchased During Period												
ABBOTT LABORATORIES INC	002824100	122,117	82,845	-1.73	.5	-2,149	-.01	68	-.19	37	-.25	5
ABBVIE INC	00287Y109	96,543	38,447	-16.30	.2	-18,799	-.13	109	-1.70	56	-2.16	9
UNITEDHEALTH GROUP, INC.	91324P102	119,412	124,884	-4.05	.8	-5,056	-.04	88	-.46	40	-.58	6
Assets Sold During Period												
BRISTOL MYERS SQUIBB CO.	110122108	0	89,509	.99	.6	1,324	.01	37	.12	25	.15	3
CELGENE CORPORATION	151020104	0	136,091	-14.80	.9	-20,142	-.14	111	-1.82	57	-2.32	10
HOLOGIC	436440101	0	103,131	-10.46	.7	-10,789	-.08	99	-.97	47	-1.24	8
Total: HEALTH CARE		824,595	1,056,345	-6.87	6.8	-59,669	-.42		-5.38		-6.87	
INDUSTRIALS												
Assets Held During Period												
CATERPILLAR INC.	149123101	104,787	106,296	-5.29	.7	-5,619	-.04	91	-.51	42	-1.07	5
FEDEX CORPORATION	31428X106	116,936	100,510	-2.51	.6	-2,522	-.02	73	-.23	38	-.48	4
MASCO CORP	574599106	90,626	97,898	-7.66	.6	-7,503	-.05	94	-.68	44	-1.42	6
NORTHROP GRUMMAN	666807102	127,778	113,291	13.89	.7	15,738	.11	4	1.42	4	2.99	1
EATON CORP PLC	G29183103	101,326	109,213	2.29	.7	2,500	.02	32	.23	21	.47	3
Assets Purchased During Period												
3M CO	88579Y101	114,150	125,569	-8.53	.8	-10,710	-.07	98	-.97	46	-2.03	7
Assets Sold During Period												
HONEYWELL INT'L INC.	438516106	0	46,008	2.09	.3	2,885	.02	30	.26	19	.55	2
Total: INDUSTRIALS		655,604	698,785	-.99	4.5	-5,232	-.04		-.47		-.99	
INFORMATION TECHNOLOGY												
Assets Held During Period												

Your Holdings Detail

Reporting period: December 31, 2017 to March 31, 2018

EASTERN BANK INVEST MGR FOR SALEM STATE UNIV (2427524)

Performance Measured Since: December 01, 1996

Holdings By Asset Class - YTD

	ID	Ending Market Value	Average Market Value	Total Return	Average Weight	Total Earnings	Total Port Cont	Total Port Rank	Asset Class Cont	Asset Class Rank	Sector Cont	Sector Rank
ADOBE SYSTEMS INC.	00724F101	147,799	122,769	23.83	.8	29,262	.20	2	2.64	2	2.02	1
ALPHABET, INC. CL C	02079K107	62,939	48,535	-1.21	.3	-586		48	-.05	29	-.04	9
ALPHABET, INC. CL A	02079K305	170,091	131,992	-1.36	.8	-1,799	-.01	63	-.16	35	-.12	11
ANALOG DEVICES	032654105	98,694	99,356	2.86	.6	2,843	.02	31	.26	20	.20	6
APPLE	037833100	215,597	184,050	-.37	1.2	-683		52	-.06	33	-.05	10
FACEBOOK CL A	30303M102	195,423	187,458	-8.55	1.2	-16,031	-.11	107	-1.45	54	-1.11	12
SALESFORCE.COM	79466L302	164,797	146,494	14.13	.9	20,692	.14	3	1.87	3	1.43	2
VISA, INC	92826C839	152,037	153,687	5.27	1.0	8,093	.06	9	.73	8	.56	3
Assets Purchased During Period												
COGNIZANT TECHNOLOGY SOL	192446102	96,681	32,371	-.45	.2	-439		47	-.04	28	-.03	8
INTUIT	461202103	139,893	131,924	6.04	.8	7,968	.06	12	.72	11	.55	4
BROADCOM, LTD.	Y09827109	95,203	31,730	.05	.2	45		42		27		7
Assets Sold During Period												
PAYPAL HLDGS INC	70450Y103	0	163,632	3.16	1.0	5,168	.04	26	.47	17	.36	5
Total: INFORMATION TECHNOLOGY		1,539,154	1,433,997	3.77	9.2	54,534	.38		4.92		3.77	
MATERIALS												
Assets Held During Period												
DOWDUPONT INC.	26078J100	112,830	124,725	-9.85	.8	-12,283	-.09	102	-1.11	50	-5.82	2
P P G INDUSTRIES	693506107	82,919	86,470	-3.98	.6	-3,441	-.02	79	-.31	39	-1.63	1
Total: MATERIALS		195,749	211,195	-7.45	1.3	-15,724	-.11		-1.42		-7.45	
TELECOMMUNICATION SERVICES												
Assets Held During Period												
VERIZON COMMUNICATIONS INC	92343V104	148,481	164,636	-8.58	1.1	-14,134	-.10	105	-1.28	53	-8.59	1
Total: TELECOMMUNICATION SERVICES		148,481	164,636	-8.59	1.1	-14,134	-.10		-1.28		-8.59	
UTILITIES												
Assets Held During Period												
NEXTERA ENERGY INC	65339F101	72,682	69,211	5.37	.4	3,714	.03	28	.34	18	2.03	1
XCEL ENERGY, INC.	98389B100	111,394	116,354	-4.59	.7	-5,343	-.04	90	-.48	41	-2.93	2
Total: UTILITIES		184,076	185,565	-.89	1.2	-1,630	-.01		-1.15		-.89	
Total: COMMON STOCK		5,772,616	6,326,422	-.47	40.4	-5,214	-.04		-.47			
DOMESTIC EQUITY FUNDS												
ETF - DOMESTIC EQUITY												

Your Holdings Detail

Reporting period: December 31, 2017 to March 31, 2018

EASTERN BANK INVEST MGR FOR SALEM STATE UNIV (2427524)

Performance Measured Since: December 01, 1996

Holdings By Asset Class - YTD

ID	Ending Market Value	Average Market Value	Total Return	Average Weight	Total Earnings	Total Port Cont	Total Port Rank	Asset Class Cont	Asset Class Rank	Sector Cont	Sector Rank	
Assets Held During Period												
SPDR FINANCIAL INDEX	81369Y605	171,706	138,472	-.71	.9	-977	-.01	54	-.09	6	-.04	4
SPDR INDUSTRIAL SELECT	81369Y704	169,753	153,640	-1.21	1.0	-1,860	-.01	64	-.17	7	-.09	5
Assets Sold During Period												
SPDR S&P 500 ETF TRUST	78462F103	0	62,356	3.25	.4	6,081	.04	19	.55	4	.28	3
SPDR HEALTH CARE SELECT SPDR ETF	81369Y209	0	61,762	3.45	.4	6,395	.04	15	.58	2	.29	1
SPDR TECHNOLOGY IDX	81369Y803	0	68,384	3.05	.4	6,263	.04	18	.57	3	.29	2
Total: ETF - DOMESTIC EQUITY		341,459	484,613	.73	3.1	15,903	.11		1.44		.73	
ETF - DOMESTIC EQUITY												
Assets Sold During Period												
I SHARES RUSSELL MIDCAP GROWTH	464287481	0	96,351	2.84	.6	8,211	.06	8	.74	1	-72.63	2
I SHARES RUSSELL 2000 VALUE INDEX FUND	464287630	0	84,210	1.22	.5	3,094	.02	29	.28	5	-27.37	1
Total: ETF - DOMESTIC EQUITY		0	180,561		1.2	11,305	.08		1.02		-100.00	
MUTUAL FUND - DOMESTIC EQUITY												
Assets Purchased During Period												
CALVERT SMALL CAP FUND	13161P862	273,647	278,141	-1.62	1.8	-4,496	-.03	87	-.41	9	-1.62	1
Total: MUTUAL FUND - DOMESTIC EQUITY		273,647	278,141	-1.62	1.8	-4,496	-.03		-.41		-1.62	
ETF - DOMESTIC EQUITY												
Assets Purchased During Period												
GUGGENHEIM SOLAR ETF	18383Q739	173,246	183,263	-5.47	1.2	-10,016	-.07	96	-.91	12	-2.73	2
POWERSHARES WILDERHILL CLEAN ENERGY	73935X112	178,625	183,064	-2.25	1.2	-4,113	-.03	85	-.37	8	-1.12	1
Total: ETF - DOMESTIC EQUITY		351,871	366,326	-3.86	2.3	-14,130	-.10		-1.28		-3.86	
MUTUAL FUND - DOMESTIC EQUITY												
Assets Purchased During Period												
CALVERT GLOBAL WATER FUND	13161P698	173,787	181,007	-3.99	1.2	-7,220	-.05	92	-.65	10	-2.00	1
CALVERT GLOBAL ENERGY SOLUTIONS	13161P813	170,697	179,550	-4.93	1.1	-8,848	-.06	95	-.80	11	-2.45	2
Total: MUTUAL FUND - DOMESTIC EQUITY		344,484	360,557	-4.46	2.3	-16,068	-.11		-1.45		-4.46	
Total: DOMESTIC EQUITY FUNDS		1,311,461	1,670,198	-.68	10.7	-7,486	-.05		-.68			
INTERNATIONAL EQUITY												
ETF - INTERNATIONAL EQUITIES												
Assets Sold During Period												

Your Holdings Detail

Reporting period: December 31, 2017 to March 31, 2018

EASTERN BANK INVEST MGR FOR SALEM STATE UNIV (2427524)

Performance Measured Since: December 01, 1996

Holdings By Asset Class - YTD

	ID	Ending Market Value	Average Market Value	Total Return	Average Weight	Total Earnings	Total Port Cont	Total Port Rank	Asset Class Cont	Asset Class Rank	Sector Cont	Sector Rank
I SHARES I SHARES EMU INDEX FUND	464286608	0	65,187	3.21	.4	6,284	.04	17	-3.74	8	-54.65	2
WISDOM TREE EUROPE HEDGED EQUITY	97717X701	0	58,337	2.98	.4	5,215	.04	24	-3.11	6	-45.35	1
Total: ETF - INTERNATIONAL EQUITIES		0	123,523		.8	11,499	.08		-6.85		-100.00	
MUTUAL FUND - INTERNATIONAL EQUITIES												
Assets Held During Period												
CALVERT INTERNATIONAL OPPORTUNIT	131649857	269,937	244,585	2.12	1.6	5,174	.04	25	-3.08	5	.28	1
Assets Purchased During Period												
DFA INTERNATIONAL SUSTAINABILITYCORE	233203199	438,204	452,369	-3.13	2.9	-14,176	-.10	106	8.45	2	-.75	2
DOMINI IMPACT INTERNATIONAL EQUITY FUN	257132811	435,234	454,160	-4.17	2.9	-18,935	-.13	110	11.28	1	-1.01	3
Total: MUTUAL FUND - INTERNATIONAL EQUITIES		1,143,375	1,151,114	-1.49	7.4	-27,937	-.19		16.65		-1.49	
ETF - INTERNATIONAL EQUITIES												
Assets Sold During Period												
I SHARES MSCI RUSSIA ETF	46434G798	0	25,475	7.79	.2	5,957	.04	21	-3.55	7	-32.84	2
SPDR MSCI ACWI EX-US ETF	78463X848	0	63,531	2.70	.4	5,145	.04	27	-3.07	4	-28.36	1
VANGUARD EMERGING MARKETS ETF	922042858	0	65,131	3.60	.4	7,039	.05	14	-4.19	9	-38.80	3
Total: ETF - INTERNATIONAL EQUITIES		0	154,138		1.0	18,141	.13		-10.81		-100.00	
MUTUAL FUND - INTERNATIONAL EQUITIES												
Assets Purchased During Period												
CALVERT EMERGING MARKETS EQUITY FUND	131649774	452,519	455,091	-.56	2.9	-2,559	-.02	74	1.52	3	-.56	1
Total: MUTUAL FUND - INTERNATIONAL EQUITIES		452,519	455,091	-.56	2.9	-2,559	-.02		1.52		-.56	
Total: INTERNATIONAL EQUITY		1,595,894	1,883,866	.51	12.0	-855	-.01		.51			
TAXABLE FIXED INCOME												
CORPORATE BOND												
Assets Held During Period												
ACE INA HOLDINGS 2.7% 03/13/2023	00440EAP2	97,575	100,147	-1.23	.6	-1,228	-.01	58	-.03	11	-.03	8
AMERIPRISE FINANCIAL INC 4% 10/15/2023	03076CAF3	184,348	187,716	-1.79	1.2	-3,364	-.02	78	-.07	24	-.09	19
AUTODESK, INC. 3.125% 06/15/2020	052769AC0	202,042	202,113	-.07	1.3	-144		46		6		4
BANK OF AMERICA CORP 3.3% 01/11/2023	06051GEU9	100,441	103,213	-1.71	.7	-1,767	-.01	62	-.04	14	-.05	11
CBS 3.7% 08/15/2024	124857AM5	149,775	156,430	-2.49	1.0	-3,894	-.03	84	-.08	29	-.10	22
CSX CORPORATION 3.4% 08/01/2024	126408HB2	175,607	183,092	-2.05	1.2	-3,754	-.03	82	-.08	27	-.10	21
CVS 3.5% 07/20/2022	126650CK4	200,951	205,744	-1.17	1.3	-2,400	-.02	71	-.05	19	-.06	15
CARDINAL HEALTH, INC. 3.2% 03/15/2023	14149YAY4	147,938	151,551	-.81	1.0	-1,232	-.01	60	-.03	12	-.03	9

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Performance Measured Since: December 01, 1996

Holdings By Asset Class - YTD

	ID	Ending Market Value	Average Market Value	Total Return	Average Weight	Total Earnings	Total Port Cont	Total Port Rank	Asset Class Cont	Asset Class Rank	Sector Cont	Sector Rank	
CELGENE CORPORATION 4%	08/15/2023	151020AJ3	204,340	212,240	-2.40	1.4	-5,098	-.04	89	-.11	31	-.14	24
CITIGROUP 3.375% 03/01/2023		172967GL9	149,057	153,887	-1.49	1.0	-2,289	-.02	70	-.05	18	-.06	14
DEUTSCHE BANK AG LONDON 2.5%	02/13/2019	25152RVS9	124,914	124,905	.26	.8	330		41	.01	3	.01	1
E M C CORP 2.65% 06/01/2020		268648AQ5	145,963	148,422	-1.66	.9	-2,468	-.02	72	-.05	20	-.07	16
FORD MOTOR CREDIT CO 4.25%	09/20/2022	345397WF6	203,362	212,100	-2.12	1.4	-4,491	-.03	86	-.09	30	-.12	23
HYATT HOTELS CORP 3.375%	07/15/2023	448579AE2	124,732	128,969	-2.20	.8	-2,833	-.02	75	-.06	21	-.08	17
MONSANTO CO 2.75% 07/15/2021		61166WAT8	198,433	202,230	-1.11	1.3	-2,249	-.02	69	-.05	17	-.06	13
TIME WARNER INC 3.4% 06/15/2022		887317AQ8	125,893	127,624	-1.37	.8	-1,745	-.01	61	-.04	13	-.05	10
VODAFONE GROUP 2.95% 02/19/2023		92857WBC3	146,526	151,783	-2.31	1.0	-3,499	-.02	81	-.07	26	-.09	20
WELLS FARGO & CO 2.15%	01/15/2019	94974BFQ8	100,014	99,530	-.06	.6	-64		45		5		3
WELLS FARGO & CO 3% 01/22/2021		94974BFR6	100,076	101,866	-1.15	.7	-1,174	-.01	57	-.02	10	-.03	7
WHIRLPOOL CORP. 4% 03/01/2024		963320AR7	205,871	212,815	-1.38	1.4	-2,936	-.02	76	-.06	22	-.08	18
XILINX, INC. 3% 03/15/2021		983919AH4	199,493	203,473	-.49	1.3	-996	-.01	55	-.02	8	-.03	6
Assets Purchased During Period													
A T & T INC 3.6% 02/17/2023		00206RCS9	227,333	234,166	-.38	1.5	-891	-.01	53	-.02	7	-.02	5
EBAY INC 3.8% 03/09/2022		278642AN3	254,343	260,119	-.82	1.7	-2,128	-.01	66	-.04	15	-.06	12
HEWLETT-PACKARD CO 4.05%	09/15/2022	428236BX0	258,213	178,061	-.02	1.1	-29		44		4		2
Total: CORPORATE BOND			4,027,237	4,042,191	-1.34	25.8	-50,341	-.35		-1.05		-1.34	
ETF - GOVERNMENT BONDS													
Assets Held During Period													
I SHARES TIPS BOND ETF		464287176	280,590	243,690	-.88	1.6	-2,145	-.01	67	-.04	16	-.50	1
I SHARES BARCLAYS 7-10 YR TREAS		464287440	302,759	189,222	-2.03	1.2	-3,837	-.03	83	-.08	28	-.89	2
Total: ETF - GOVERNMENT BONDS			583,350	432,912	-1.38	2.8	-5,981	-.04		-1.12		-1.38	
ETF - CORPORATE BONDS													
Assets Held During Period													
ISHARES FLOATING RATE BOND ETF		46429B655	195,113	180,112	.49	1.2	884	.01	38	.02	1	.29	1
Assets Purchased And Sold During Period													
I SHARES I BOXX INVESTMENT GRADECORPORATE		464287242	0	81,910	-.45	.5	-1,112	-.01	56	-.02	9	-.36	2
Total: ETF - CORPORATE BONDS			195,113	262,022	-.07	1.7	-227					-.07	
MUTUAL FUND - CORPORATE BONDS													
Assets Held During Period													
CALVERT INCOME FUND		131582793	251,179	185,731	-1.86	1.2	-3,448	-.02	80	-.07	25	-.80	3
Assets Purchased During Period													
PAX WORLD HIGH YIELD BOND-I		704223809	201,103	206,269	-1.57	1.3	-3,235	-.02	77	-.07	23	-.75	2

Your Holdings Detail

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Performance Measured Since: December 01, 1996

Holdings By Asset Class - YTD

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Assets Sold During Period											
SHENKMAN SHORT DURATION HIGH INCOME FUN 00770X709	0	54,828	.40	.4	658		39	.01	2	.15	1
Total: MUTUAL FUND - CORPORATE BONDS	452,282	446,828	-1.40	2.9	-6,025	-0.04		-1.13		-1.40	
Total: TAXABLE FIXED INCOME	5,257,981	5,183,953	-1.30	33.1	-62,575	-0.44		-1.30			
CASH AND EQUIVALENTS											
CASH UNINVESTED											
Assets Held During Period											
	-9,487	0	.00	.0	0		43		2		1
Total: CASH UNINVESTED	-9,487	0	.00	.0	0						
MONEY MARKET FUNDS											
Assets Held During Period											
FEDERATED GOV'T OBLIGATION TAX MANAGED FU 60934N849	368,247	580,013	.24	3.7	1,387	.01	36	.24	1	.24	1
Total: MONEY MARKET FUNDS	368,247	580,013	.24	3.7	1,387	.01		.24		.24	
Total: CASH AND EQUIVALENTS	358,760	580,013	.24	3.7	1,387	.01		.24			
Total	14,296,712	15,644,452	-0.52	100.0	-74,742	-0.52					

Investment Commentary

We probably aren't the only investors hoping that Paul Simon was right when he sang "April, come she will, / When streams are ripe and swelled with rain." Financial markets in March were just as nasty as the weather; after enduring volatile markets and frequent snow, it should be comforting to know that April showers have historically been accompanied by the second-best calendar performance of the year. Only November historically has been better.

There haven't been many places to hide from this winter's investment storms. Through the first three months, the S&P 500 index of large-cap U.S. stocks fell 2.5% (with nine of the eleven industry sectors in the red); small caps were fractionally down; and international developed markets lost 1.5%. In equities, the only bright spot was the 1.4% gain in emerging markets.

The story in fixed income wasn't any better. Rising interest rates knocked 1.5% off the Bloomberg Barclays U.S. Aggregate index in the first quarter, and Treasuries fell 1.2%. Although credit spreads remained tight, high-yield bonds slipped 1.9%. In fixed income, only shorter-term floating-rate instruments enjoyed a positive first quarter.

While the declines were widespread, they weren't deep. Outside of a few isolated instances, markets have mostly recovered from their late January swoon. Stocks are down only about 8% from their peak. Most economic indicators depict a healthy and growing economy, and analysts still expect double-digit corporate earnings growth. The Fed has so far held to its forecast of three quarter-point rate hikes this year.

Our client portfolios have been resilient through the markets' volatility this year. Equity portfolios have been close to their benchmarks; our technology holdings led the way, despite adverse headlines about Facebook's lax privacy policies and weakness in some other areas. Our global accounts in particular benefited from our decision last January to increase our participation in emerging markets. Our clients' fixed income portfolios likewise were lifted by our investment in floating rate and TIPS bond funds.

We remain vigilant, as always, but for now we believe that solid earnings growth and synchronized global economic expansion will support securities markets even as the Fed gradually raises interest rates.

Michael A. Tyler, CFA
Chief Investment Officer

Notes and Disclosures

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Past performance does not guarantee future performance.

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SUBJECT: Institutional Advancement/Marketing & Communications Committee Meeting Report for May 23, 2018

The Institutional Advancement/Marketing & Communications Committee of the Board of Trustees met on Wednesday, May 23, in the Paul Petrowski Conference Room located in Marsh Hall on the Central Campus of Salem State University.

Present for the committee were Jamie Zahlaway Belsito, Midge DeSimone (vice chair), Teresa Chisholm, Magnolia Contreras and Daniel Veira. Trustee Pamela Scott (chair) and Ruthanne Russell participated via conference call; President Keenan (ex-officio), Vice President McGurren (committee liaison) and Associate Vice President Crounse, and Staff Associate Shahin.

Trustee Scott called the meeting to order at 4:30 pm.

*In accordance with the Open Meeting Law all votes taken during this meeting, in which a member participated remotely, were by roll call vote.

Update on Fundraising for FY18 (*Attachment A*)

Vice President McGurren reviewed the Monthly Fundraising Snapshot, for the period ending April 30, 2018. She reported there has been a significant increase in fundraising since April 30. We have raised another \$361,000 since April 30. Our total raised toward our FY18 \$2M goal is \$1,981,811, with a balance to be raised by June 30 of \$18,189. She reviewed the year-to-date comparison and reported the FY17 endowment is skewed due to the significant Gordon gift received in FY17.

Crounse reported on the very successful Viking Warrior Day. We raised \$38,000 from 208 donors. Employee alumni and donors were engaged with a breakfast to launch the day. It was a day of pride building with our current students; campus was abuzz with a real sense of energy on the last day of classes. Our alumni and volunteers were engaged in the day from cleaning up the bike path to celebrity scoopers. There was a huge social media presence throughout the day, not only from Salem State University social media accounts from many of our alumni board and active community members. We engaged social media ambassadors in this work. It is a tradition we hope to report with Viking Warrior Day happening again next year. We have already chosen a date and it is May 1, 2019.

McGurren stated that when President Keenan learned that fundraising outreach for the class of 1968 had broken class records, going from \$50,000 in previous classes to over \$300,000 so far, he

suggested we consider a naming to honor the 50th Reunion fundraising effort, led by Joanne Ricciardiello. Upon investigation, we found a space valued at \$100,000 in Atlantic Hall, a lounge off the main corridor of Atlantic Hall. The intent is to name that space the “Class of 1968 Lounge” as a surprise recognition for their efforts. The financial figure associated to this naming is outline in the list of naming opportunities that was previously approved by the Board of Trustees. Per our naming policy, I, as Vice President, submitted this recommendation to Trustee Mattera, Chair of the Board of Trustees, and Trustee Scott, as chair of Institutional Advancement/Marketing & Communications Committee, for their review and approval. They approved the recommendation on May 11.

McGurren then reviewed the events scheduled for Alumni Weekend. Alumni Weekend will be taking place from Thursday June 7 through Sunday, June 10. The Reunion Society Reception will be held at the Hawthorne Hotel on Thursday, June 7, starting at 6:00 pm. On Friday, June 8 we will be hosting the Youth at Risk conference from 8:00 am to 4:00 pm. This event gets bigger each year. This year we expect 800 outside participants. Also on Friday, June 7 we will be holding the Class of 1968 50th Reunion Dinner at the Kernwood Country Club. Saturday, June 9 will be the Global Day of Service in addition to our annual Party on McKeown Plaza (POMP). Last year we welcomed more than 400 alumni and friends. We will be wrapping up Alumni Weekend on Sunday, June 10 with the Jazz and Champagne Brunch, starting at 11:00 am in Marsh Hall Dining Commons.

A Motion was made by Scott, seconded by Chisholm and unanimously voted to adjourn the meeting. Trust Chair Scott asked for a roll call vote.

Pam Scott – yea (on call)

Midge DeSimone – yea

Jamie Zahlaway Belsito – yea

Teresa Chisholm – yea

Ruthann Russell – yea (on call)

The meeting was adjourned at 4:40 pm.

Monthly Fundraising Snapshot
FY18 to April 30, 2018

Fundraising To-date

FY18 Goal	\$2,000,000
Total for FY18	<u>\$1,620,821</u>
Balance	\$379,179

Total Fundraising break-out by Campaign – Year-to-Date Comparison

	FY18 to April	FY17 to April
	7/1/2017 to 4/30/2018	7/1/2016 to 4/30/2017
	Total	Total
Gift campaign		
Annual Restricted	\$427,075	\$507,614
Annual Unrestricted	\$353,331	\$239,292
Campaign Unrestrict	\$0	\$1,038
Endowments	\$522,897	\$3,622,524
Annual Restricted 25K up	\$317,517	\$849,192
	<u>\$1,620,821</u>	<u>\$5,219,660</u>

Total Fundraising break-out by Campaign – Monthly Comparison

	April	April
	4/1/2018 to 4/30/2018	4/1/2017 to 4/30/2017
	Total	Total
Gift campaign		
Annual Restricted	\$37,464	\$36,364
Annual Unrestricted	\$17,515	\$17,678
Campaign Unrestricted	\$0	\$0
Endowments	\$132,179	\$121,344
Annual Restricted 25K up	\$0	\$110,000
	<u>\$187,158</u>	<u>\$285,386</u>

Total Unrestricted Cash Raised – Year-to-Date Comparison

	FY18 to April	FY17 to April
	7/1/2017 to 4/30/2018	7/1/2016 to 4/30/2017
	Total	Total
Gift campaign		
Annual Unrestricted	<u>\$252,717</u>	<u>\$261,916</u>

SUBJECT: Risk Management and Audit Committee Meeting Report for May 23, 2018

The Risk Management and Audit Committee of the Board of Trustees met on Wednesday, May 23, 2018, in the Paul Petrowski Conference Room located in Marsh Hall on the Central Campus of Salem State University.

Present for the Committee: Trustees Lutts (chair), Scott (vice chair) via phone, DeSimone, Katzman, Zahlaway-Belsito, Chair Mattera (ex-officio), President Keenan (ex-officio). Also present and participating Vice President House (committee co-liaison) and staff assistant Beaulieu.

Absent for the Committee: Assistant Vice President Labonte (committee co-liaison)

Trustee Lutts, committee chair, called the meeting to order at 4:40 pm.

*In accordance with the Open Meeting Law all votes taken during this meeting, in which a member participated remotely, were by roll call vote.

Audit (Attachment A and B)

Auditors David DiIulis and Zachary LaFlash from O'Connor & Drew briefed the committee on the FY2018 audit planning and process (Attachment A). Correspondence between the Commonwealth's Deputy Comptroller and Vice President House discussing unfunded pension and OPED liabilities and its impact on the university finances was distributed (Attachment B).

IT Security Assessment (Attachment C)

Thomas Cesso the university's chief information security officer presented a cybersecurity update.

MIT Court Decision

Rita Colucci, general counsel, briefed the committee on a court decision rendered involving Massachusetts Institute of Technology (MIT). Under certain circumstances, a university can be held liable for a student's suicide. Dean Carla Panzella discussed Salem State University's protocols for addressing students that exhibit behavior that could cause reasons for concern.

Executive session

Trustee Katzman **MOVED** and Trustee Zahlaway **SECONDED** a motion to enter into executive session in accordance with General Laws, Chapter 30A, for discussing litigation. A roll call vote was taken at 5:21pm and it was unanimous to enter into executive session.

Voting in the affirmative: DeSimone, Katzman, Lutts, Scott (via phone), Zahlaway-Belsito

Voting against: None

Trustee Zahlaway-Belsito **MOVED** and Trustee DeSimone **SECONDED** a motion to exit executive session in accordance with General Laws, Chapter 30A. A roll call vote was taken 5:35 pm and it was unanimous to exit executive session.

Voting in the affirmative: DeSimone, Katzman, Lutts, Scott (via phone), Zahlaway-Belsito

Voting against: None

There being no further business to come before the committee, Trustee Zahlaway-Belsito moved and Trustee DeSimone seconded a motion to adjourn.

MOTION: to adjourn the meeting

Voting in the affirmative: DeSimone, Katzman, Lutts, Scott (via phone), Zahlaway-Belsito

Voting against: None

The motion passed.

The meeting adjourned at 5:36 pm.

Prepared by: D. Beaulieu, staff assistant, finance and facilities

Salem State University

Audit Planning Meeting

May 9, 2018



25 Braintree Hill Office Park, Suite 102
Braintree, MA 02184
617.471.1120

Key Audit Staff

- David A. Dilulis, CPA, Engagement Partner
- Zachary Laflash, CPA, Engagement Manager
- Brendan Covey, CPA, Audit Senior
- Ruth Nakawungu, Audit Staff
- Joseph Messina, Audit Staff

Current Year Topics

- Timing of Audit
- Audit Approach
- Other Items for discussion

Timing of Audit Planning/Fieldwork

- Internal Control Systems Testing June 11th – 15th
- Uniform Guidance Fieldwork July 23rd – 27th
- Start of Audit Fieldwork Week of July 30th
- End of Audit Fieldwork August 31st

Audit Approach

- Internal Control Systems Testing:
 - Cash disbursements
 - Student revenue & cash receipts
 - Payroll
 - General journal entries
- Uniform Guidance Fieldwork:
 - Student Financial Aid Eligibility Testing
 - Single Audit Compliance Testing
- Audit Fieldwork:
 - Risk based audit of June 30, 2018 financial statement account balances based on results of interim control testing.

Questions/Concerns

- Other items to be discussed which might have an effect on the annual audit
- Other questions/concerns regarding the annual audit

The material below is excerpted from e-mails exchanged between VP for Finance and Facilities Karen House (SSU) and Deputy Comptroller Howard Merkowitz (CTR) between Nov. 6, 2017 and Jan. 22, 2018.

Executive Summary: CTR office states that the university's financial obligation with regard to unfunded pension and OPEB liabilities will be satisfied through future fringe benefit charges only; not with a request for lump sum payments. CTR commits to provide estimates fringe benefit rates, for planning purposes, for a 4-5 year period rolled forward annually.

SSU (11/6/17):

I am following up on a specific topic through this message that is important to our campuses' ability to conduct multi-year financial planning. As you may recall, we would appreciate it very much if you would provide a projected estimate of future fringe benefit rates for a 4-5-year future period. Ideally, this would be a new deliverable that you would provide initially and then roll forward each year on a consistent date. We understand that you cannot commit the Commonwealth to such rates and would rely on the existing process for notification of actual fringe benefit rates (in February or March) for the fiscal year ahead. Nonetheless, to assist in our financial planning on a consistent basis, each institution should use the same estimated fringe benefit rates obtained from the office with the most expertise in developing the rates. Could you reply with your thoughts about how and when to operationalize this important planning request?

CTR (11/17/17):

With respect to your request for a multi-year projection of fringe benefit rates, we can attempt to do that when the Comptroller's Office develops its FY19 fringe benefit proposal, which will be over the next month. Developing a multi-year fringe rate projection essentially requires projecting three variables: (1) the Commonwealth's annual pension contribution; (2) GIC health insurance cost trends; and (3) growth in the Commonwealth's wage and salary base.

As you note, the projections would be pro forma, as the Comptroller's Office cannot commit to any rate beyond that which has been formally proposed to the federal government, and as with any projection, the out year estimates become exponentially more uncertain.

SSU (1/18/18):

I wanted to check on the status of development of multi-year fringe benefit rate estimates for planning purposes. Would you please give me an update? If they're not ready yet, do you have an estimated date for us?

In addition, I am very interested in returning to the discussion with your office of how "real" the pension and OPEB liabilities are for our institutions. My board finance committee chair is asking me to provide a clearer picture, and I need your help to do so. You will recall that we've asked on several occasions for written explanations that we can provide to our presidents and board members. We need to be certain whether the portion of the unfunded liabilities sitting on our

books is a real obligation of the university that we will have to, at some point, fund. As you can imagine, funding those liabilities means charging students more than we otherwise would, so we consider it essential to understand our obligation versus that of the Commonwealth. Should Kevin and I schedule a teleconference or in person meeting on this topic and if so, with whom?

CTR (1/18/18):

As for your question on pension and OPEB liabilities, those (with OPEB being recorded on balance sheets as of 6/30/18, in addition to pensions) merely recognize the future costs of pensions and OPEB that you have already been paying (and presumably have budgeted for) through the fringe benefit rate, which incorporates pension and health insurance costs, including OPEB costs.

SSU (1/18/18):

Regarding OPEB and pension, are you saying that the university will not have to provide funding to reduce or eliminate those liabilities in the future except through future fringe benefit charges?

CTR (1/19/18):

Correct. Higher education institutions already are providing the funding through fringe charges, which pay for each institution's portion of the pension and OPEB benefits.

That said, if the OPEB liability ever does get reduced based on a fixed funding schedule similar to pensions (with increasing annual appropriations), that would increase the fringe charges higher education (and all other non-General Fund accounts) would have to pay.

SSU (1/20/18):

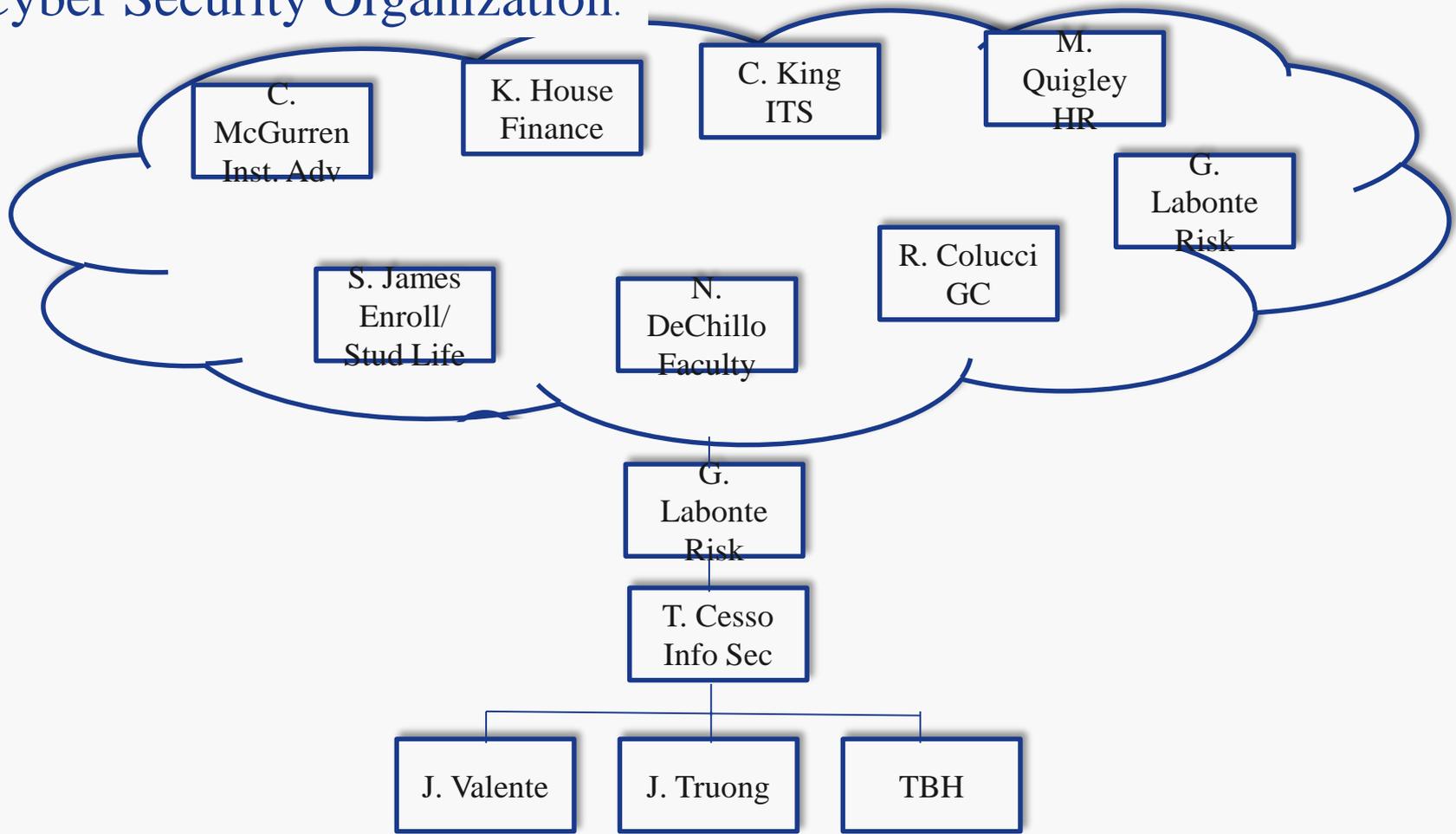
Understood, thank you Howard. I'm sure you can see how important it is for our financial planning purposes to have estimates of future fringe rate charges. Can you direct me to where I can find out more about the Commonwealth's plan to eliminate the unfunded pension liability?

Cyber Security Update for Risk Committee

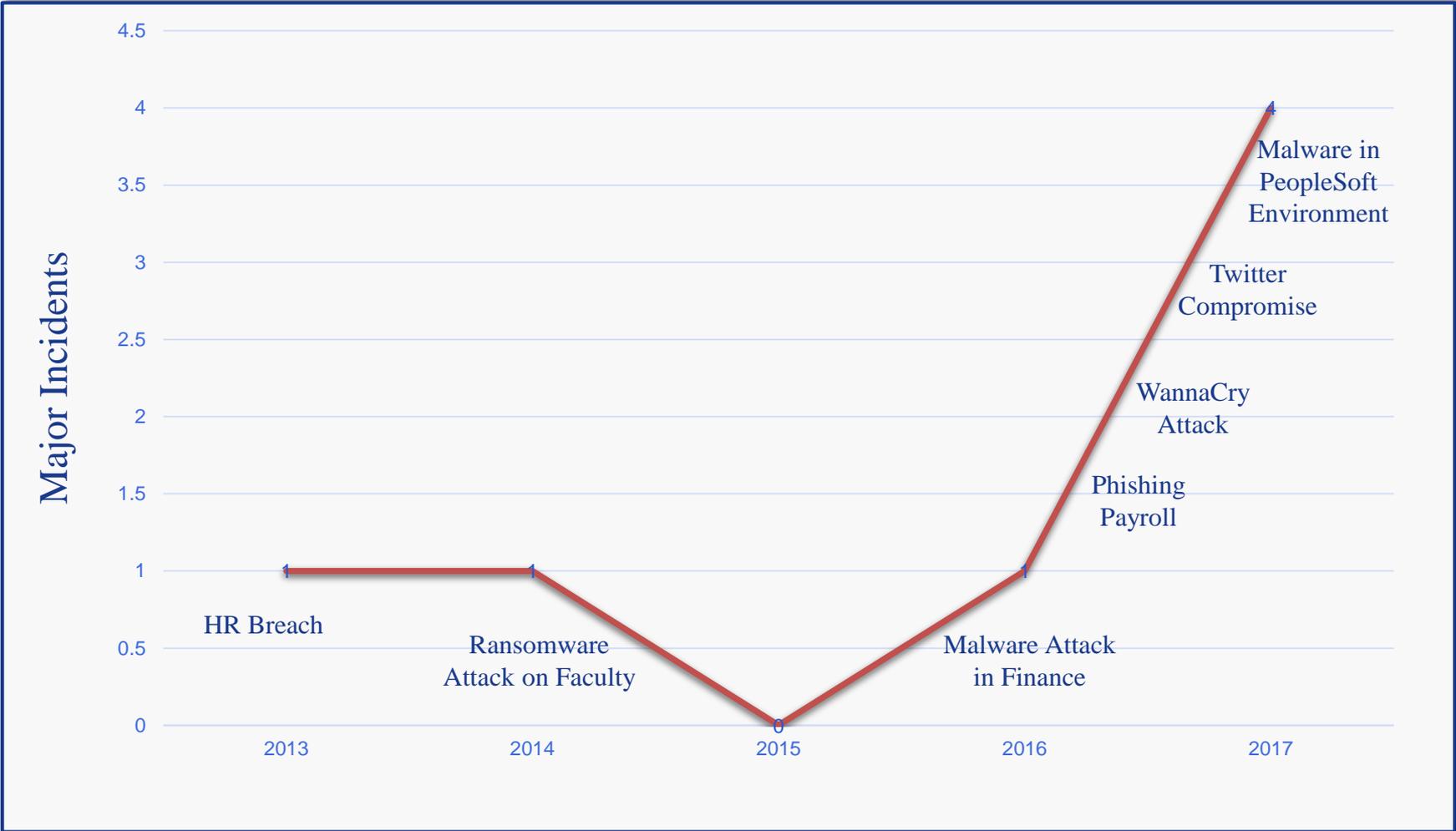
Thomas Cesso, CISSP

Cyber Security Objective: To Protect People and Assets, Institute Policies, Manage Risks, Comply with Statutes, & Increase Awareness.

Cyber Security Organization.



Major Cyber Incidents at SSU



1. Identified and Mitigated Risks:

- A. Mitigated Wide-Spread Attack on MA State Payroll.
- B. Implemented Security Incident & Event Management Center.
- C. Prevented WannaCry Attack and Ransom of SSU.
- D. Conducted Least Privileges Review of MA Comptroller Systems.
- E. Addressed Malware within PeopleSoft Infrastructure.
- F. Conducted Tabletop Exercise of Disaster Recovery Capabilities.

2. Ensured Compliance:

- A. Met Payment Card Industry (PCI) Mandates.
- B. Passed Two Access & Entitlement Reviews by MA Comptroller.
- C. Passed One State Testing of Access Controls Inquiry by Auditor KPMG.
- D. Performed Personal Health Information (PHI) Records Inventory.

Milestones for 2017

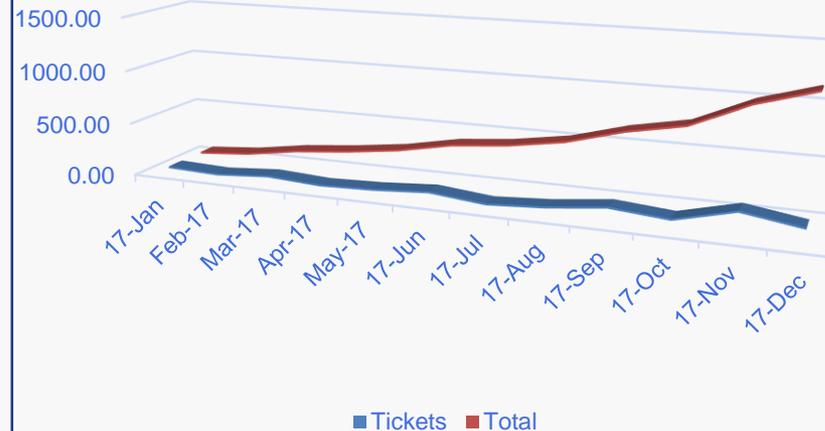
3. Wrote & Issued Necessary Policies & Plans:

- A. New SSU Information Security Policy.*
- B. New Security Training and Awareness Policy.*
- C. New Written Information Security Plan.*
- D. New Password Policy.
- E. New Incident Response Plan.*

Trained Employees



Mitigated Incidents



*Regulatory/Statutory

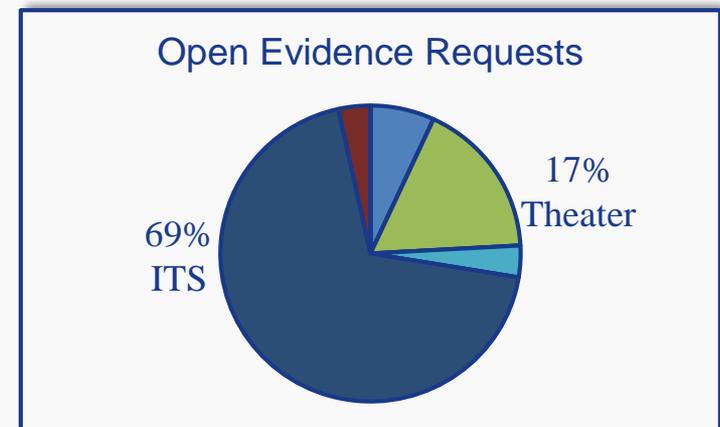
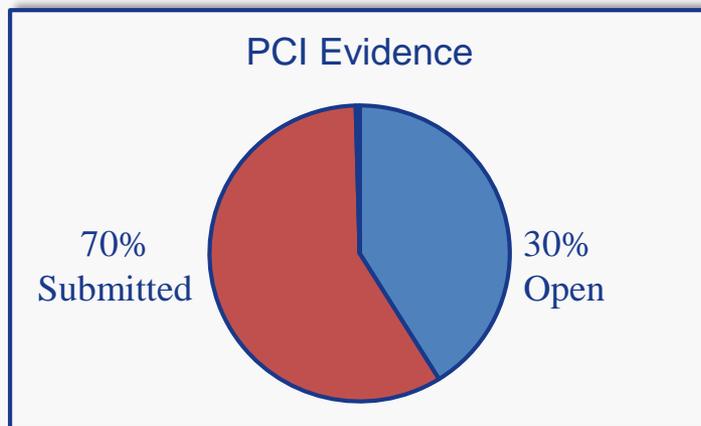
Cyber Security Initiatives for 2018

- A. Ensure Compliance with PCI for 2018 (R2).
- B. Implement a New Password Policy (R2).
- C. Implement New Info Security Tools for Email Protection (R2).
- D. Obtain Cyber Insurance (R2).
- E. Establish & Test a Disaster Recovery Capability (R4).
- F. Develop Medical Records Plan and Implement (R2).
- G. Define General Data Protection Requirements & Implement (R2).
- H. Assess Compliance with Gramm-Leach-Bliley Act (GLBA) (R2).
- I. Implement & Test Information Security Incident Response Plan (R2).

Notes: R2 - SSU Internal Controls Committee – Disclosure of Confidential Data
R4 - Ibid – Disaster Recovery of the Datacenter

A. Ensure Compliance with Payment Card Industry (PCI) for 2018. Attachment C

- Established Library of Process Controls in 2017 to Leverage Going Forward.
- Initiated 2018 PCI Compliance Assessment and Engaged Consultants.
- Collecting 98 Pieces of Evidence Requested by Auditors.
- Onsite Interviews TBD.
- Targeting Compliance by Summer 2018.



B. Implement of New Password Policy to Reduce Risk of Unauthorized Access.

- New Policy Agreed to in July 2017.
- Complies with Requirements for Massachusetts Comptroller and Executive Office Technology & Security Services.
- Approx. 200 High Risk Users Converted (Finance, HR, ITS, etc) to New Password Policy.
- 2,600 Faculty & Admin Converted thru May 2018.
- Students Accounts Targeted for Conversion Beginning Fall 2018.

D. Obtain Cyber Insurance to Provide Turnkey Incident Response & Reduce Risk.

- SSU Out-of-Pocket Review Cost Savings of Approx. \$150k from Last SSU Breach in 2013.
- 7% Likelihood of SSU Breach Over Next 12 Months.*
 - 5.24% Chance of Credit Card Breach Costing Up To \$4.3 M.
 - 1.65% Chance of Personal Information Breach Costing Up To \$1.59 M.
 - 0.18% Chance of Health Record Breach Costing Up To \$1.95 M.
- A Majority of Institutions Carry Cyber Insurance, with the Exception of Mass Public Higher Ed.
- Beazley Recommended Carrier Out of Four Provider Quotes.
- Re-Assessing Entire Insurance Portfolio. Cost Savings to Fund Cyber Policy.

*Marsh Cyber IDEAL Privacy Breach Model for SSU, Dec. 7, 2017.

E. Establish & Test a Disaster Recovery (DR) Capability.

- Conducted SSU Disaster Recovery Tabletop Test on Sept 20, 2017.
- Approx. 8 Weeks to Re-establish Business Systems (loss of Stanley Datacenter).*
- Two Audit Findings Identified SSU Need to Improve DR Capabilities for Critical Business Systems (2004** & 2012**).
- Prior Auditor Identified, in IT General Controls (ITGC), Need to Improve DR Capabilities for Critical Business Systems 2016***).
- KPMG, in Mass Single Audit, Recommends, “Restoration processes (DR) should be tested at least annually...” for 2017 – Preparation for 2018.****

Notes:

* ITS Estimate

** State Audits of SSU

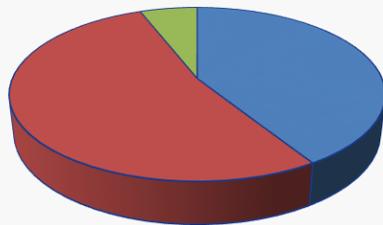
*** ITGC Assessment, Cohn & Resnick

**** KPMG Audit Issues from the MA Comptroller Single Audit

F. Develop Private Health Information (PHI) Management Plan & Attachment C Implement.

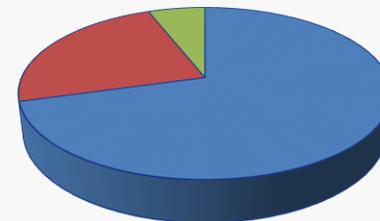
- 19 Known Instances of PHI Were Identified at SSU.
- UMass Fined \$650k by Dept. Health Human Services/Office Civil Rights for a Violation of HIPAA.
- Specific Determination of Criteria for HIPAA Applicability Under Review.
- We Have a HIPAA Compliant Solution in Use at the SSU Clinic.

Applicable Statutes for SSU
PHI Records



■ HIPAA ■ FERPA ■ TBD

SSU Owners of PHI
Records



■ Enrollment/Student Life ■ Faculty/Provost
■ Risk Management

G. Define GDPR* Requirements for SSU & Implement.

- GDPR Mandate Effective May 25, 2018.
- SSU Committee** Formed to Review Requirements and Oversee Implementation, as Needed.
- Specific Requirements TBD.
 - ✓ For EU Residents in EU (cross-border transactions).
 - ✓ For SSU with EU Operations.
 - ✓ For SSU if “Significant” EU Residents as Students.
 - ✓ SSU/US Residents Attending Semester Abroad.
 - ✓ Distant Learning from EU to SSU.

*General Data Protection Requirements for European Union.

**SSU Committee on GDPR Led by General Counsel.

H. Assess Compliance Gramm-Leach-Bliley (GLBA) Act.

- GLBA Applies to Financial Transactions at Title IV Schools.
- Starting in January 1, 2018, GLBA Information Safeguards will be Audited*...
- Penalties for Non-Compliance** Include:
 - ✓ Institutions Subject to Civil Penalties of up to \$100K for Each Violation.
 - ✓ Officers and Directors Personally Liable for Violations with Civil Penalties of Up To \$100K for Each Violation.
 - ✓ Institution, Officers and Directors Subject to Fines or Imprisonment.

Notes: * Financial Student Aid, Office of DOE 2017 Training.
 ** GLBA Compliance Requirements Summary, 12/20/17.

I. Implement & Test Information Security Incident Response Plan (IRP).

- Incident Response Plan Required for Payment Card Industry Compliance.
- IRP Also an Important Element for Preparedness & Managing Risk.
- SSU IRP Approved April, 6, 2018.
- Tabletop Test Scheduled for June 4, 2018.

Questions & Answers

Thank You!

SUBJECT: Executive Session Notes for May 23, 2018

The Risk Management and Audit Committee of the Board of Trustees of Salem State University voted unanimously to go into executive session on Wednesday, May 23, 2018 in the Petrowski Room, Marsh Hall located on Central Campus of Salem State University. The purpose for the executive session was to discuss litigation.

Staff assistant Beaulieu took the roll at 5:21pm; voting in the affirmative to enter executive session were Trustees DeSimone, Katzman, Lutts, Scott (via phone) and Zahlaway-Belsito.

*In accordance with the Open Meeting Law all votes taken during this meeting, in which a member participated remotely, were by roll call vote.

An update on a public records request was discussed.

With no further business to be discussed in executive session, Chair Lutts called for a motion to come out of executive session.

Upon a motion duly made by Trustee Zahlaway and seconded by Trustee DeSimone it was unanimously

VOTED: To adjourn from executive session

Staff assistant Beaulieu took the roll at 5:35 pm; voting in the affirmative to exit executive session were Trustees DeSimone, Katzman, Lutts, Scott (via phone) and Zahlaway-Belsito.

The Risk Management and Audit Committee came out of Executive Session.

SUBJECT: Academic Affairs and Student Life Committee Meeting Report for May 23, 2018

The Academic Affairs and Student Life Committee of the Board of Trustees met on Wednesday, March 28, 2018, in the Paul Petrowski Conference Room of Marsh Hall on the Central Campus of Salem State University.

Present for the Committee were Trustees Chisholm (chair), Contreras, DeSimone, Murphy, Veira, and Russell (via phone); Chair Mattera (ex-officio); President Keenan (ex-officio); Provost Silva (committee liaison), Executive Vice President James (committee liaison), and staff associate Longo, academic affairs. Also present and participating in the meeting was Interim Dean Jeanne Corcoran.

*In accordance with the Open Meeting Law all votes taken during this meeting, in which a member participated remotely, were by roll call vote.

Trustee Chisholm called the meeting to order at 5:40 pm. The following items were discussed:

Overview of the Tenure & Promotion Process

Provost Silva provided the committee with an overview of the tenure and promotion process. A brief discussion ensued.

MSCA Personnel Actions

Provost Silva presented the candidates recommended for tenure, tenure with promotion, promotion, emeritus, and terminal contract (Attachment A). After careful consideration, the committee took the following action:

Upon a motion made duly by Trustee Murphy and seconded by Trustee DeSimone, it was unanimously:

VOTED: to recommend to the full board the personnel actions for Faculty Tenure as presented.

VOTED: to recommend to the full board the personnel actions for Faculty Tenure with Promotion to the rank of Associate Professor as presented.

MSCA Personnel Actions

Five Separate Votes

1. Tenure
2. Tenure with Promotion
3. Promotion
4. Emeritus Status
5. Terminal Contract

Tenure

- Associate Professor Douglas Chene, Accounting & Finance
- Professor Michael Melendez, Social Work
- Associate Professor Christopher Yakes, Mathematics

Tenure with Promotion to Associate Professor

- Assistant Professor Jennifer El-Sherif, Sport and Movement Science
- Assistant Professor Carol Gawrys, Nursing
- Assistant Professor Jonathan Lukens, Social Work
- Assistant Professor Amy Jo Minett, English
- Assistant Professor Steven Oliver, Secondary and Higher Education
- Assistant Professor Tanya Rodrigue, English
- Assistant Professor Sheila Schreiner, Biology

Promotion to Full Professor

- Associate Professor George Abboud, Sport and Movement Science
- Associate Professor Reva Kasman, Mathematics
- Associate Professor Jean MacLachlan, Occupational Therapy
- Associate Professor Saverio Manago, Marketing & Decision Sciences
- Associate Professor Anna Rocca, World Languages and Cultures
- Associate Professor Elspeth Slayter, Social Work
- Associate Professor Stephenie Young, English

Promotion to Full Librarian

- Associate Librarian Carol Zoppel

Promotion to Associate Professor

- Assistant Professor Margaret Ackerman, Nursing
- Assistant Professor Robin Benton, Sport and Movement Science
- Assistant Professor Cheryl Williams, Nursing

Emeritus Status

- Associate Professor Paula Burnett, Nursing
- Professor Charlene Campbell, Nursing
- Professor Susan Case, Biology
- Professor Richard Elia, English (posthumous)
- Professor R. Clarke Fowler, Childhood Education and Care
- Associate Professor Helen Glickman, Social Work
- Professor Lindley Hanson, Geological Sciences
- Professor Marie Jensen, Nursing
- Professor Krishna Mallick, Philosophy
- Professor Stephen Matchak, Geography
- Assistant Professor Sheila Shea, Computer Science
- Professor Marcia Weinstein, Psychology

Terminal Contract

- Associate Professor Jose Salgado,
Secondary and Higher Education

**Salem State University
Maguire Meservey College of Health & Human Services
School of Nursing**

Brief Plan of Action-May 22, 2018

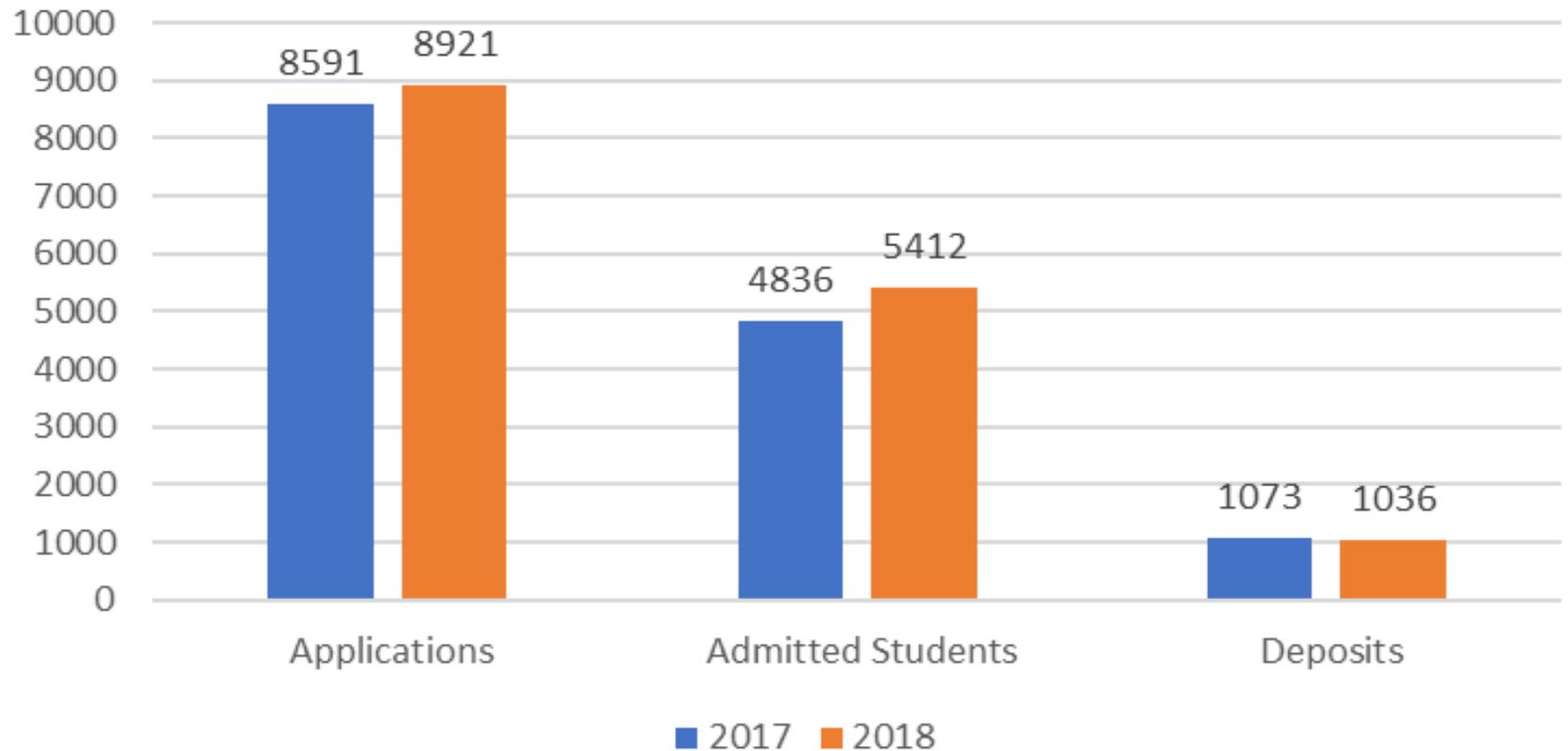
<u>Issue of Concern from BORN</u>	<u>Plan of Action Required</u>	<u>Steps Taken</u>	<u>Current Updates/ Process</u>	<u>Date Finalized</u>
Administrator	Appoint Interim Associate Dean	Approval received and Linda Frontiero Appointed	Documentation sent to BORN and CCNA with news of administrator Change	Awaiting Confirmation and Acknowledgement from both agencies
Determined the Need to Review all Policies & Procedures in the SON to ensure BORN compliance	Policies pertaining to: Faculty role in SEP and admissions requirements, non-discriminatory & Nursing oversight policies, adjustment of job descriptions to include language pertaining to SEP participation, policies related to curricular revision, Immunization requirements for students, policy inconsistencies, a web site change from recommended to required, the use or need for TEAS testing (data needed to support), readmission and progression criteria, withdrawal policy inconsistencies, attendance policy revision, students rights and grievance policy, GPA analysis and meeting minutes policy for the SON.	Two workshops were held 5/15-5/21 with faculty to review all policies and procedures, conduct several policy and program votes to make adjustments, assign committee members to policies that needed addressing and determined person taking the lead.	Policies have been examined and changes to documents are moving forward	Project that some policy revisions will be instituted for the June 30 th BORN update while others will take additional time according to the BORN time table for the December 31 st correspondence.

<u>Issue of Concern from BORN</u>	<u>Plan of Action Required</u>	<u>Steps Taken</u>	<u>Current Updates/ Process</u>	<u>Date Finalized</u>
Addressing Gaps in the Nursing Program curriculum and establishing an action plan	An action plan is not currently present and needs to be provided. A GAP analysis in the curriculum for both didactic and clinical aspects have been completed.	This work to establish a plan of action has been initiated with representatives from each course together with the members of the curriculum committee	In Progress- Recommend careful monitor of this action step by the Interim Associate Dean	Update of process/progress to BORN scheduled for June and December 2018
Compliance with contract documentation between clinical agencies and SSU	An addendum has been created, sent through university counsel for review and approval and now being sent to clinical agencies.	Creation of document to meet BORN regulation	Process completed	May 2018
Student notification for participation in faculty governance is not present	Create process by which students are notified of opportunities for participation	Initial work begun at workshops	In process	June/December 2018
Unable to demonstrate that professional development is a line item in the budget	Demonstrate how SSU supports professional development. Not able to explicitly show this.	Currently looking to administration to solve/make recommendations	In Process	June 2018
Student Feedback during Clinical Placements	Revise policies and procedures as well as curriculum to reflect that students are receiving adequate oral and written feedback during clinical placements	Chair is making efforts to have faculty initiate revision of curriculum and policies	In Process	December 2018

Enrollment Update

Incoming, Fall 2018

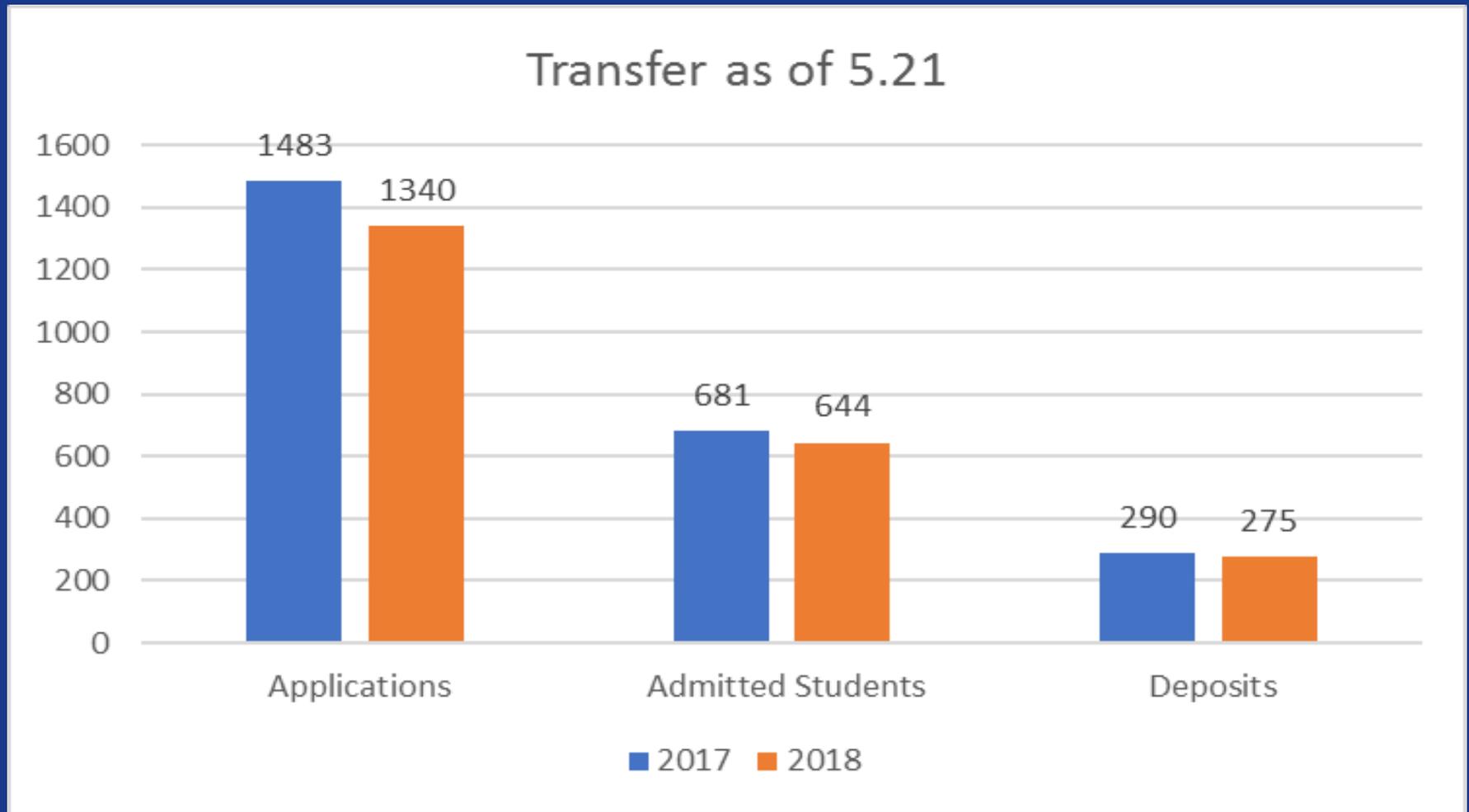
Freshmen as of 5.21



Recruitment Strategies

- High school & CBO visits
- On-the spot reviews
- On and off campus events
- High school guidance counselor outreach
- Extensive marketing & communication campaigns - earlier outreach/list buy
- Funnel strategy

Incoming, Fall 2018

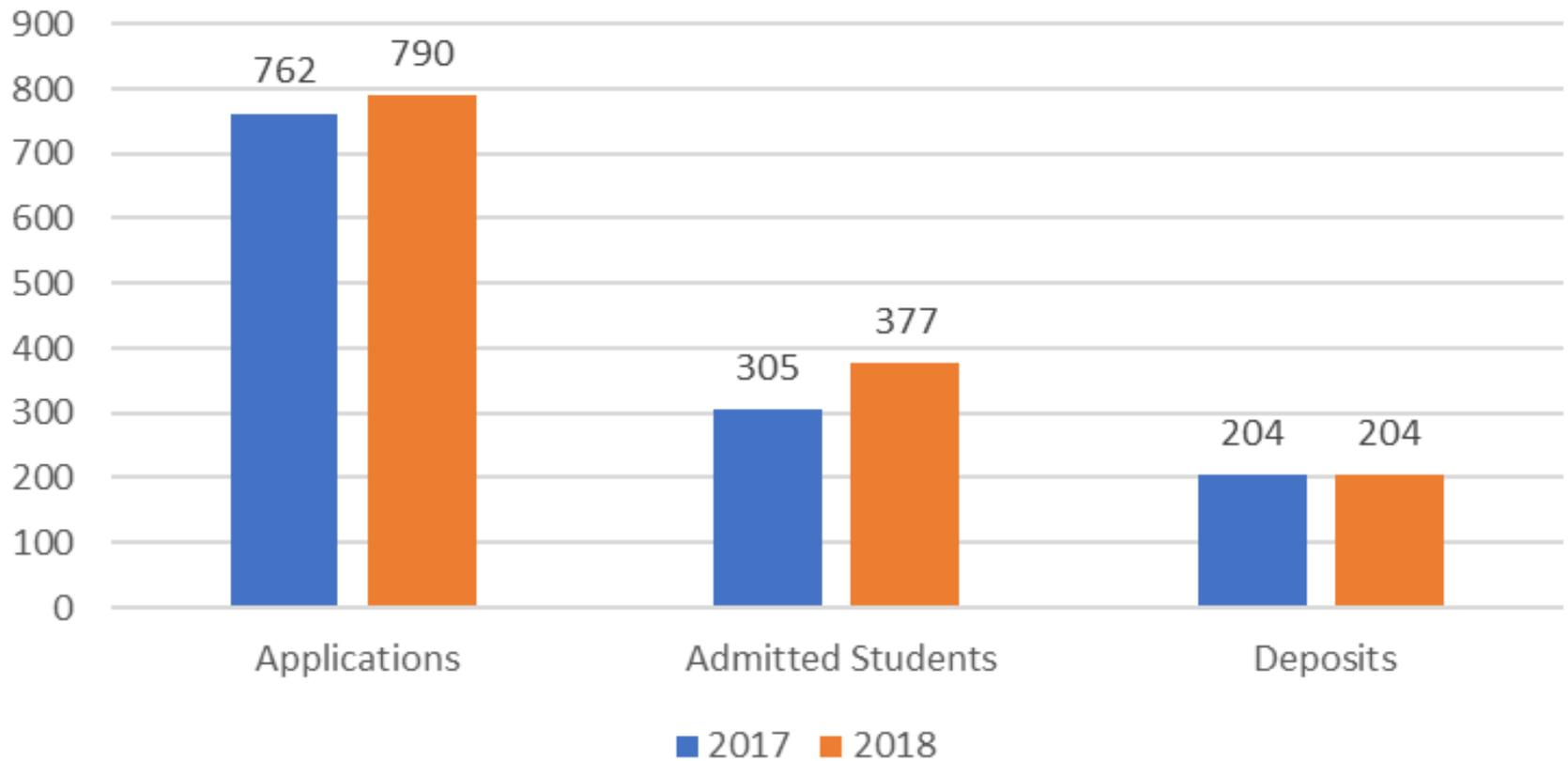


Recruitment Strategies

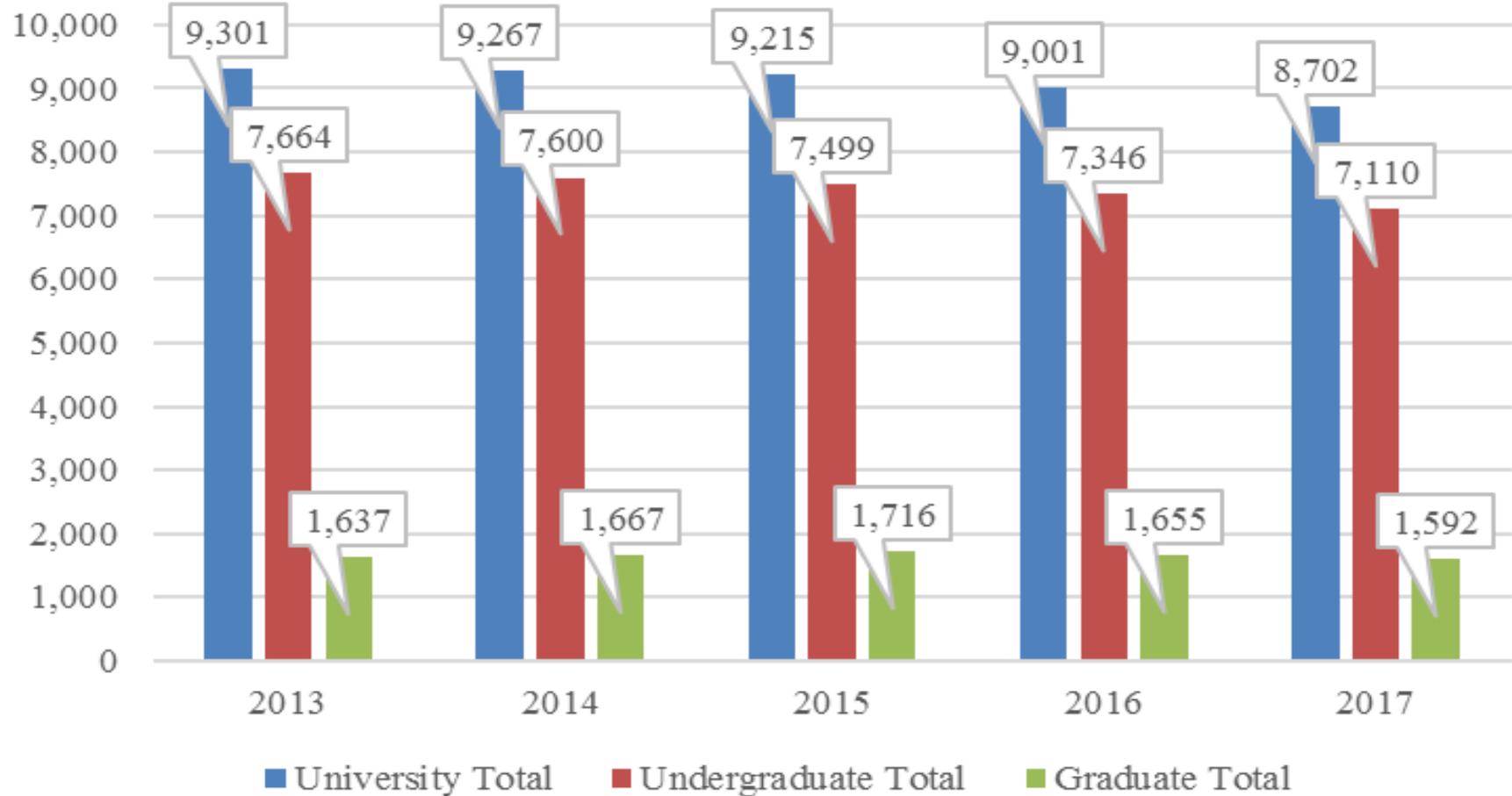
- Community College Visits
- Articulations/Pathways
- Digital marketing strategy
- Funnel communication campaign
- On and off campus events

Graduate

Graduate As of 5.21



Enrollments

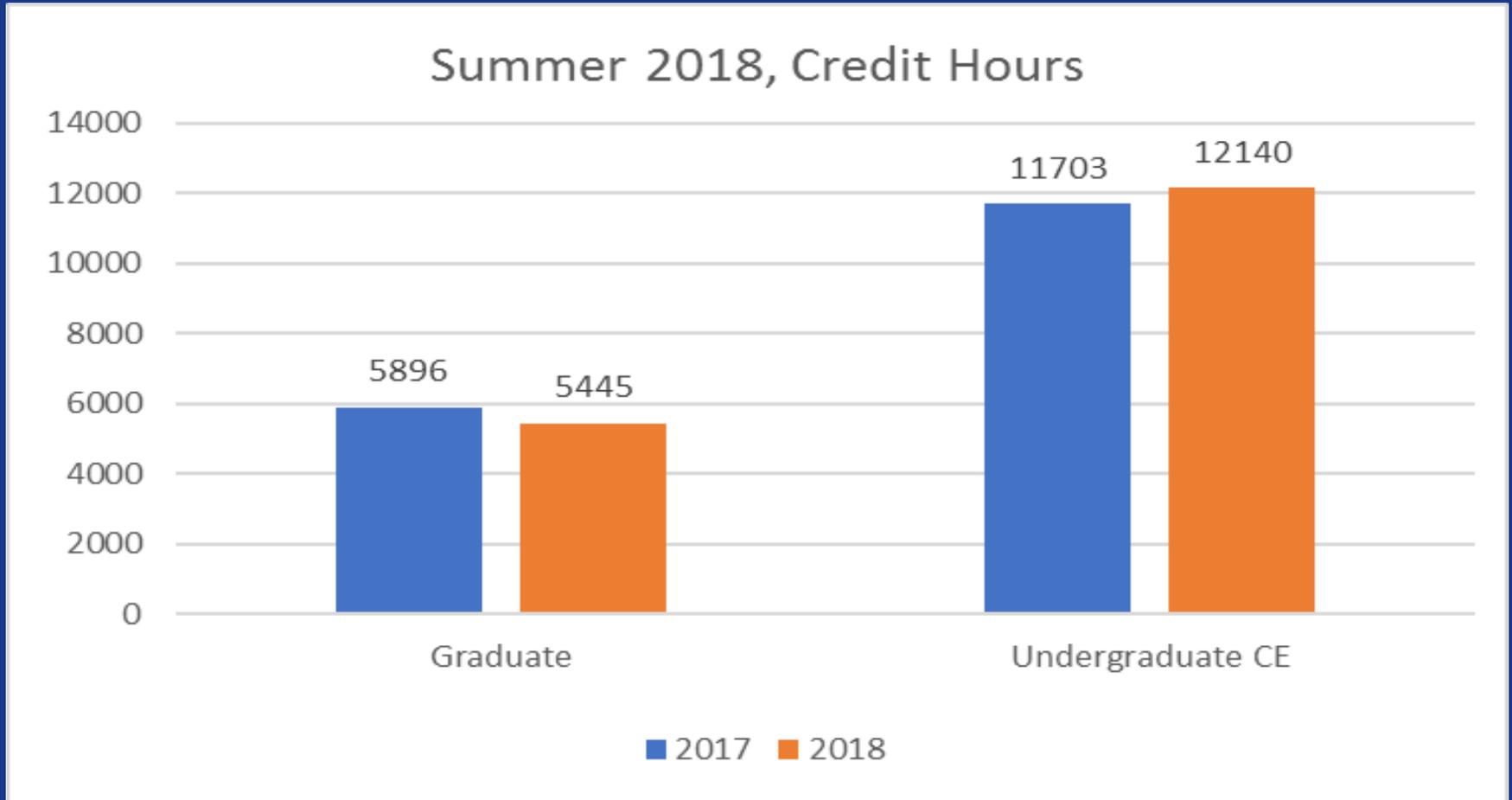


Why are enrollments down?

- Increased graduation rate – student success
- Incoming enrollments flat (less high school graduates)
- Transfer market down significantly
- First to second year retention
 - Financial
 - Academic
 - Fit
 - Life/Family Commitments
 - SSU is a safety school

Summer Credit Hours

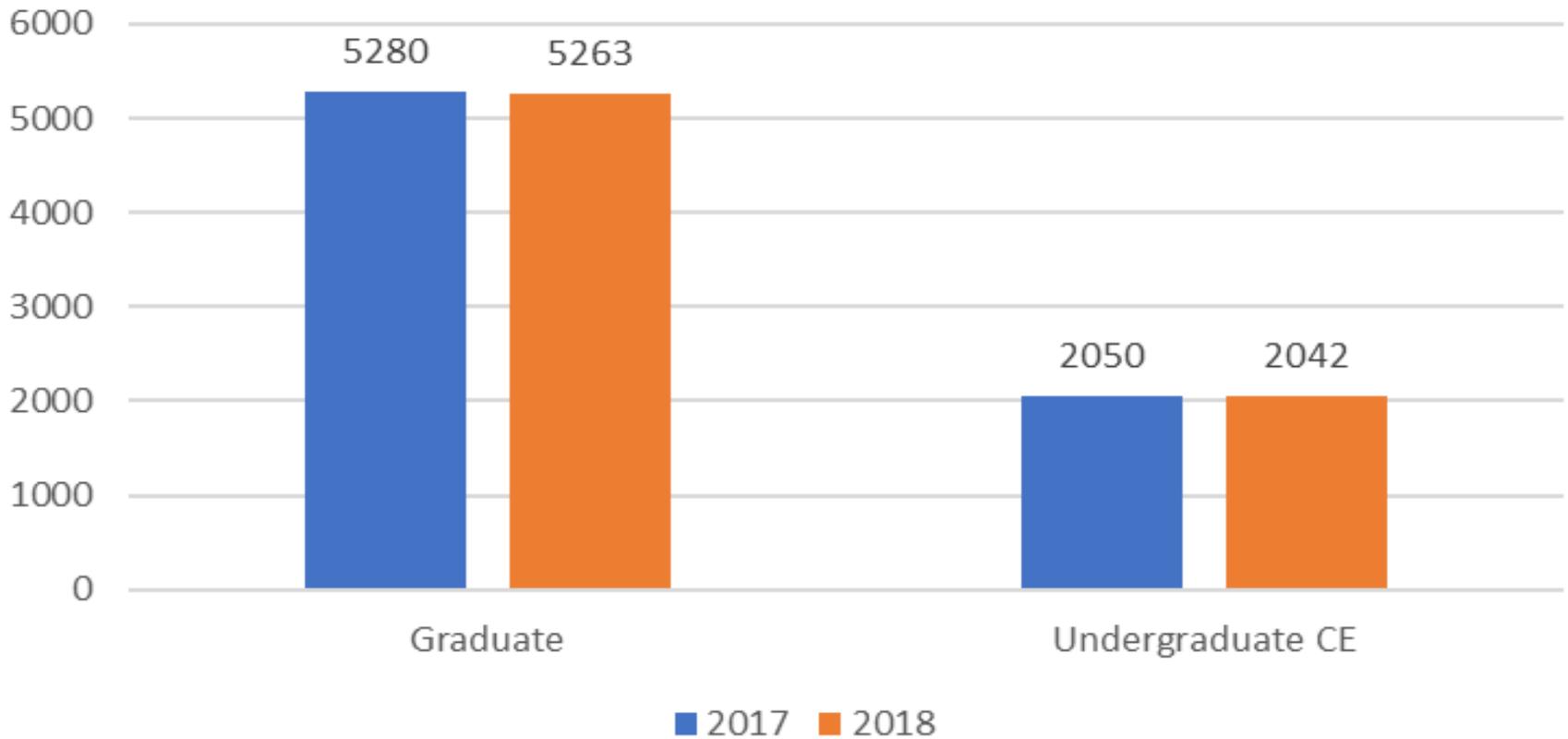
As of 5.20



Fall Credit Hours

As of 5.20

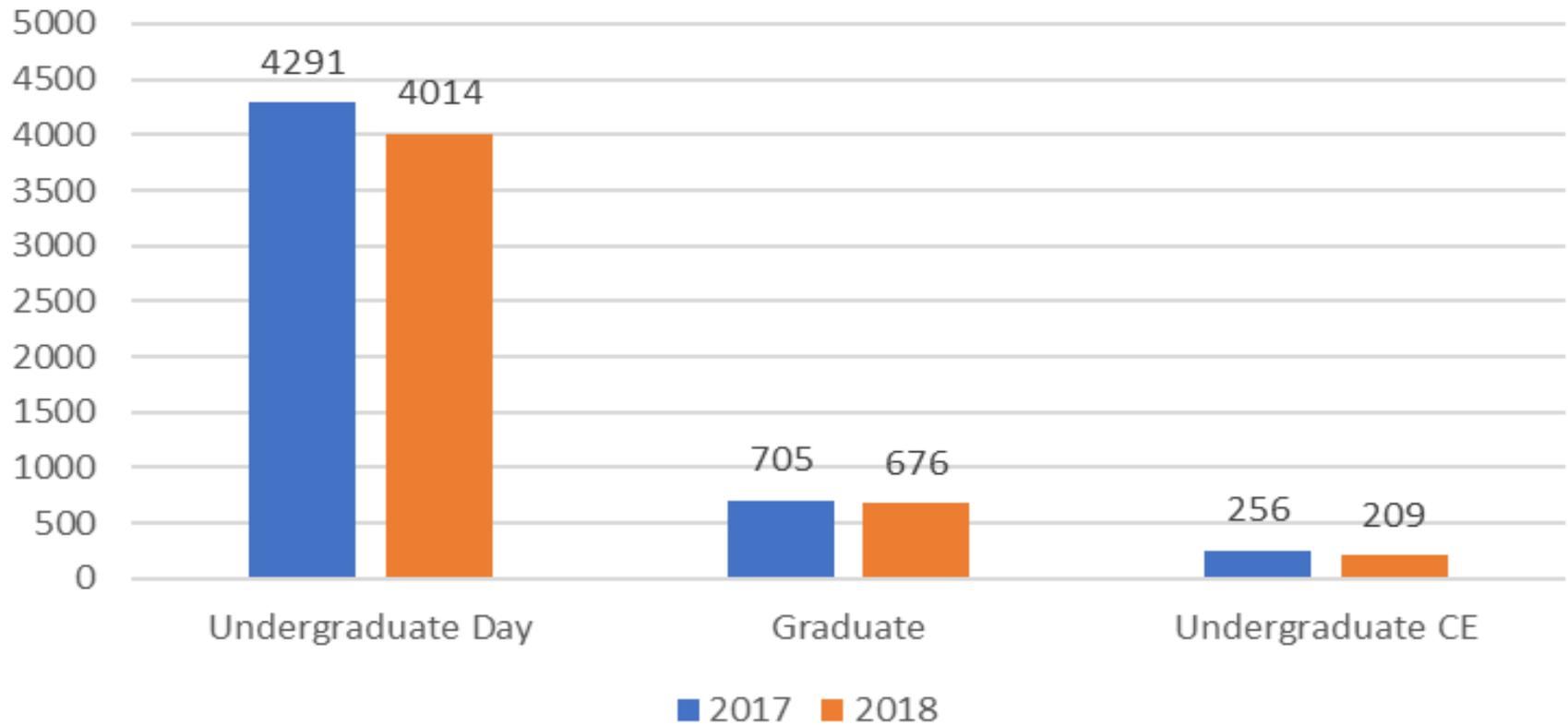
Fall 2018 Credit Hours



Fall 2018 Headcount

As of 5.20

Headcount



Fall 2018 Registration Campaign

- Faculty outreach
- Registration event at CAE
- CAE, first year experience, enrollment management and student life coordination
 - Financial holds
 - Financing your education
 - Circle of Care
 - Academic support
 - Direct Mail

Retention/Success Strategies

- SNC – coaching model
- Nudge campaigns – cross campus collaboration
- Move-in Campaign
- Cohort campaigns
- Financial literacy programming
- Student advocacy
- MAP-Works
- Center for Academic Excellence
- First Year Experience
- Summer Bridge Academy
- Increase in Honors admits
- Learning communities, residential curriculum
- Diversity and multicultural affairs initiatives

SUBJECT: Executive Committee Meeting Report of May 23, 2018

The Executive Committee of the Board of Trustees met Wednesday, May 23, 2018, in Marsh Hall, room 210, located on the Central Campus of Salem State University.

Present for the Committee were Trustees Mattera (chair), Lutts, Scott (phone), Chisholm, President Keenan (Committee Liaison); Secretary to the Board Montague and Assistant Secretary Sadowski.

*In accordance with the Open Meeting Law all votes taken during this meeting, in which a member participated remotely, were by roll call vote.

Chair Mattera called the meeting to order at 6:55 pm and announced that due to the late hour the committee would table the committee schedule discussion (agenda item III) to the June 6th Board meeting.

Chair Mattera brought forth the first matter for review which was the Presidential Review Committee's Report (Attachment "A") and commended Trustee Lutts who chaired the committee and Trustees Chisholm, and DeSimone for their work on the report.

Upon a motion duly made by Trustee Lutts and seconded by Trustee Scott, and by roll call vote it was unanimously

VOTED: The Executive Committee of the Board of Trustees of Salem State University hereby accepts and approves the annual review of John D. Keenan for 2017-2018 as presented by the Presidential Review Committee to be submitted to the Board of Higher Education.

Voting in the affirmative: Chisholm, Lutts, Scott, Mattera (chair)

Voting in the negative: None

Absent: None

Chair Mattera moved to the next agenda item which was a discussion of Trustee Emeritus nominations. There was a brief discussion regarding the nomination and acceptance process and Chair Mattera announced that he would accept nominations for Trustee Emeritus. Trustee Chisholm offered a nomination for Jacob Segal which Chair Mattera accepted. Trustee Chisholm then made the following motion which was seconded by Trustee Lutts, and by roll call vote it was unanimously

VOTED: The Executive Committee nominates Jacob Segal as Trustee Emeritus and recommends that the Board of Trustee confirm the nomination.

Voting in the affirmative: Chisholm, Lutts, Scott, Mattera (chair)

Voting in the negative: None

Absent: None

There being no further business to come before the committee and upon a motion duly made by Trustee Chisholm and seconded by Trustee Lutts, it was unanimously

VOTED: To adjourn the meeting at 7:05 pm

Prepared by: L. Montague, Secretary to the Board of Trustees

2017-2018 Executive Summary

Presidential Review: Salem State University, President John D. Keenan

Presidential Review Committee

Robert Lutts, chair

Teresa Chisholm, trustee

Mary DeSimone, trustee

I. The Review Process

The 2017-2018 annual review process began with a charge from the board chair to the Presidential Review Committee to produce a report to be considered for a vote by the board at its regular meeting on June 6, 2018. The Presidential Review Committee established the criteria for review, clarified the protocol for completion of the review, and determined the timeline of meetings required in order to submit the review by the deadline of June 30, 2018. While the Department of Higher Education guidelines on presidential evaluations do not require a formal evaluation of a president who has been in office for less than one full year, the board of trustees agreed to conduct a post-transition assessment of President Keenan's eight months in the position to review his progress to date.

The committee examined the president's performance in two broad areas: the specific goals set forth by Salem State University and the performance of the university against system-wide goals. In addition to focusing on the "Big Three" Statewide Priority Objectives, the system-wide goal evaluation looked at campus safety and violence prevention and increasing diversity in leadership positions. The assessment of John D. Keenan's Presidential Initial Review and the analysis of relevant data has demonstrated a strong and effective transition period over the past eight months. The report highlights an excellent understanding of the challenges the university faces over the coming years. President Keenan's report demonstrates a keen understanding of the goals of both the Board of Higher Education and the goals set by the board of trustees at Salem State University.

II. The Performance Data to Support Conclusions and Recommendations

Performance data are embedded within each section of this document. Additional supporting materials are listed in Section V. Individual documents are attached to John D. Keenan's Presidential Initial Review 2017-2018.

III. Summary Statement

The board of trustees recognizes that President Keenan has completed a thorough self-evaluation focused on his transition to the position of president and the specific goals for this year. The Presidential Review Committee is impressed with the depth of understanding that President Keenan has demonstrated of the challenges the university is facing. Declining enrollments, expanding expenses for faculty, and overhead benefits costs are creating a difficult financial environment. President Keenan presents this situation very clearly in a graph of enrollment and total faculty and staff expenses in his summary report (page 13, John D. Keenan's Presidential Initial Review 2017-2018). Another example of President Keenan's understanding of the significance of these issues was his announcement on May 8, 2018, that

the university would implement a hiring freeze to prompt a financial adjustment as a result of softer than projected enrollment numbers for AY 2018-2019. The committee appreciates in these challenging times of declining demographics the president's prudent pause to be intentional in the allocation of restrained resources. The committee understands that eight months is far too short a period of time to provide an in depth assessment of performance in the position. Nevertheless, the committee is certain that President Keenan is off to a strong start. He has made a few key staff changes and succeeded in retaining all major leadership positions in the first six months. He has conducted a number of introductory meetings with faculty and has used these meetings as an opportunity to communicate the challenges and opportunities that the university is facing.

We are hopeful that this open communication approach is effective at gaining buy-in for the strategies President Keenan is implementing. We are confident that President Keenan is setting the groundwork for a strong working relationship with the faculty and staff of the university. We believe President Keenan is presenting a clear set of goals and is pursuing a collaborative effort to engage faculty and staff.

A. Institutional Goals

AY 2017-2018 Goals and Priorities

- Completing Strategic Plan (2017-2021) and gaining approval by the Board of Higher Education
- Preparing and presenting proposal for the Science Teaching Laboratory Addition (STLA) to Baker Administration
- Completing Campus Climate Survey and rolling out results to campus community
- Transitioning into presidential role

President Keenan has successfully completed his AY 2017-2018 goals and has set clear and measurable goals for the upcoming AY 2018-2019. These priorities are itemized below. We have seen many programs and initiatives launched with the objective of helping achieve these goals. We believe these goals are aligned with the system-wide priority objectives set forth by the Board of Higher Education.

We have been impressed with President Keenan's approach to utilizing the information obtained from the Campus Climate Survey to demonstrate areas of concern and use this information to help create a positive and inclusive environment throughout the university. Culture is created at the top. President Keenan and his staff are setting a good example for the university to follow. A healthy culture of inclusion is a goal that is highly valued by President Keenan and his staff.

AY2018-2019 Goals and Priorities

- Increase enrollment +100 students
- Obtain funding for STLA
- Initiate/plan new comprehensive fundraising campaign
- Increase additional auxiliary revenues (summer housing)
- Gain approval of Occupational Therapy Doctorate (clinical)
- Gain approval of our BS in IT
- Evaluate "online" initiatives/collaborations

- Seek “control” of strategic Canal Street properties
- Hire a new permanent VP for Diversity and Inclusion
- Build on our concerted efforts to increase faculty of color
- Continue making positive gains toward closing achievement gaps
- Draft Cat Cove business plan and evaluate private collaborations.

B. System-Level Goals

Salem State University continues to be guided by the tenets and the goals set forth by the Board of Higher Education. The following details highlight data points in each of the “Big Three” Statewide Priority Objectives:

Access – President Keenan is developing a plan to enhance the community college channel to the university. He is developing specific programs to grow and expand access to the university. President Keenan is working closely with the Black, Brown, and Proud group and the Student Government Association to insure the university is encouraging proper communication to foster greater student access with all groups in the university.

Closing Achievement Gaps - The near term goals and longer term goals clearly are aimed at enhancing the success of students all across the university. This should be a strong step toward closing achievement gaps.

College Completion/Success – Over the past decade the university has improved substantially the time period in which students graduate and the graduation completion rates. President Keenan is aiming to continue to improve on these statistics. We do recognize that completion statistics can be at odds with the goal of improving access. If we grow the number of students attending our programs, we may be expanding into a group of students that may take longer to graduate. This may mean some of these goals may be in conflict with each other (access versus completion). We believe President Keenan is well aware of these issues and will do what is best for all students at our institution.

C. Campus Safety and Violence Prevention

President Keenan has worked closely with Assistant Vice President for Public Safety and Risk Management Gene Labonte and Vice President for Finance and Facilities Karen House to place a high priority on safety throughout the university. The campus has successfully implemented the Department of Higher Education’s best practices for campus safety and violence prevention through online and in person trainings. In addition, the university has an active Care and Concern Team, Prevention Task Force, and Prevention Education Advocacy Response (PEAR) program; launched a Bias Response Team; reviewed its emergency preparedness and expressive activities policies; and launched the Rave Guardian mobile application with the campus community this academic year. The board is confident that the university is addressing campus safety and violence prevention.

The results of the Campus Climate Survey (conducted in Spring 2017) were presented to the campus in early November. The report was extremely useful in identifying the needs on campus and issues that must be addressed. President Keenan appointed a Climate Survey

Implementation Team (CSIT) and charged them with reviewing the data and working with the university community to implement strategies that improve the campus climate. We were pleased that President Keenan involved the board in the roll-out of survey results. This initiative remains a priority for his administration as well as for the board of trustees.

D. Increasing Diversity in Leadership Positions

President Keenan has made key appointments to his leadership team that demonstrate a commitment to diversity in administrative management. With the departure of the inaugural vice president for inclusive excellence in the fall, President Keenan appointed interim co-chief diversity and inclusion officers to complete the current academic year. They have done an excellent job of stewarding this office during a period of transition. One of these individuals has been appointed for the next academic year and the university is actively working toward recruitment of a permanent vice president.

One emerging trend from the Campus Climate Survey results was a need to increase hiring and retention of faculty and staff from culturally diverse backgrounds. To address this matter, the CSIT is planning to draft a five-year plan to increase diverse faculty and staff on campus. The Human Resources and the Inclusive Excellence offices now conduct equity reviews for all employment searches and this year offered several professional development and training opportunities focused on cultural competency, diversity, and inclusion.

IV. Recommendation for Compensation Adjustment

The Department of Higher Education advises that newly appointed presidents are not eligible for compensation adjustments during their first year status. As such, the board will not make a recommendation for a compensation adjustment as part of the 2017-2018 review process.

V. Supporting materials: charts, graphs, and/or data

John D. Keenan's Presidential Initial Review 2017-2018 and Appendices

- A. Presidential Leadership Profile
- B. Inauguration Address of John D. Keenan
- C. Assessment of Campus Climate Executive Summary
- D. Strategic Plan
- E. Science Teaching Laboratory Addition

John D. Keenan's Presidential Review Addendum

Black, Brown, and Proud Update



John David Keenan, JD

Presidential Initial Review

August 6, 2017 – April 15, 2018

April 15, 2018

TABLE OF CONTENTS



Introduction	2
Top Priorities for the First Year	4
Campus Climate Results	4
Strategic Plan Approval	4
Science Teaching Lab Addition (STLA)	6
Board of Higher Education Priorities – Progress on the Big Three	6
Access	6
Closing Achievement Gaps	8
Completion/Success	9
Progress on Our Strategic Plan	12
Conclusion & AY 2018-2019 Goals and Priorities	22
Exhibits	
President Leadership Profile	A
Inauguration Address of John D. Keenan	B
Assessment of Campus Climate Executive Summary	C
Strategic Plan	D
Science Teaching Laboratory Addition	E

INTRODUCTION

While the Department of Higher Education does not require a presidential review during the first year a president takes office, I fully agree with the Board of Trustees (BOT) that it makes sense to review my initial performance and, more importantly, set goals for AY2018-2019. At the February 7, 2018, BOT meeting, Chair Paul Mattera appointed Trustees Rob Lutts, Teresa Chisholm and Midge DeSimone as the Presidential Review Committee (PRC).

Transition to the Presidency:

With my confirmation as candidate on June 20, 2017 (BHE vote), I was extremely fortunate to have extensive overlap with outgoing President Pat Meservey (see attached Exhibit A, Presidential Leadership Profile). President Meservey and I met regularly for the several weeks prior to her retirement on August 5, 2017. President Meservey transferred all outstanding matters relative to the administration of the office. I was honored to be able to formally introduce my vision for Salem State to the campus, local, and regional community at my inauguration on January 19, 2018 (see attached Exhibit B, Inaugural Address).

Transfer of relationships:

With this presidential transition coming on the heels of an extremely successful comprehensive campaign, it was critically important to make sure the “handing off” of relationships with key stakeholders was seamless. We spent most of the summer and the early fall engaging with the campus community, community college leaders, civic leaders/elected officials, donors, business and community partners, and peers in higher education. Campus community conversations included one-on-one meetings with members of the Board of Trustees, a listening tour with faculty from each school, meetings with union leadership, the Student Government Association and more. In addition to in-person meetings, former President Meservey, Institutional Advancement Vice President Cynthia McGurren, Institutional Advancement AVP Cheryl Crouse, and I thoroughly reviewed all active supporters and identified potential future donors as well. I am confident these transitional conversations went well. Indeed, I believe this relationship building aspect of the position is one of my greatest strengths. It is truly a pleasure to meet and work with such passionate supporters of Salem State.

Building the team:

As I've said many times, I was extremely fortunate to inherit from President Meservey an exceedingly strong and talented senior team. As an internal candidate, I had the good fortune of working with all members on the senior team through the President's Executive Council (PEC). I had been completely transparent with my peers regarding my intent to seek the presidency. Once I was selected and confirmed as President, I had individual meetings with each member of the PEC to ascertain their plans. Here again, I am proud to report not a single member of the senior team decided to leave because of the transition. Chief of Staff Beth Bower advised me of her desire to retire; however, she was agreeable to stay on for a few extra months to assist with my transition. Thankfully, President Meservey's internal team, Adria Leach, Katie Sadowski, Lynne Montague, Nicole Giambusso, and Kim Burnett also remained.

Without hesitation, I knew who could fill the role of my new Chief of Staff. Nate Bryant, alumnus, had proven himself an asset to Salem State time and time again over the course of his more than two decades of service. Through many different roles (admissions and advising) and in leading both the Strategic Planning Committee and 10,000 Reasons Campaign (on campus), Nate had the respect of the entire campus. Moreover, as a resident of Salem and former school committee member, he had the local contacts and instincts to assist with "town – gown" relations.

With Nate in place, I quickly reaffirmed the other PEC members' commitments to stay in place. Appreciating the value of having a general counsel on campus, I also decided to fill the vacancy I had left. Through a competitive search process lead by Nate, we were fortunate to recruit an experienced public higher education attorney. Rita Colucci joined us in December after having served at Framingham State University for over a decade in many capacities including Director of Human Resources, Chief of Staff to the President, and General Counsel.¹ I promoted Scott James to Executive Vice President and assigned him the additional responsibilities of Human Resources and Information Technology. I also re-united Facilities with Finance under Chief Financial Officer Karen House. With the full team in place, we were ready to go!

¹ I think it is also important to note that I was fully transparent with FSU President Javier Cevallos and worked out a smooth transition so that he was not left without counsel.

Top Priorities for the first year

Having been a member of the PEC since 2014, I was aware of the priorities for my first few months in office: completing the **Strategic Plan** (2017-2021) and gaining Board of Higher Education (BHE) approval; preparing and presenting our proposal for the new **Science Teaching Lab Addition (STLA)** to the Baker Administration; and completing our **Campus Climate Survey** and rolling out the results to campus. We restructured Beth Bower's position to take the lead on completing the Strategic Plan and finalizing our STLA proposal. Beth was also assigned to assist former Vice President for Diversity and Inclusion, Lisa McBride with rolling out the campus climate survey results.

a. Campus Climate Results

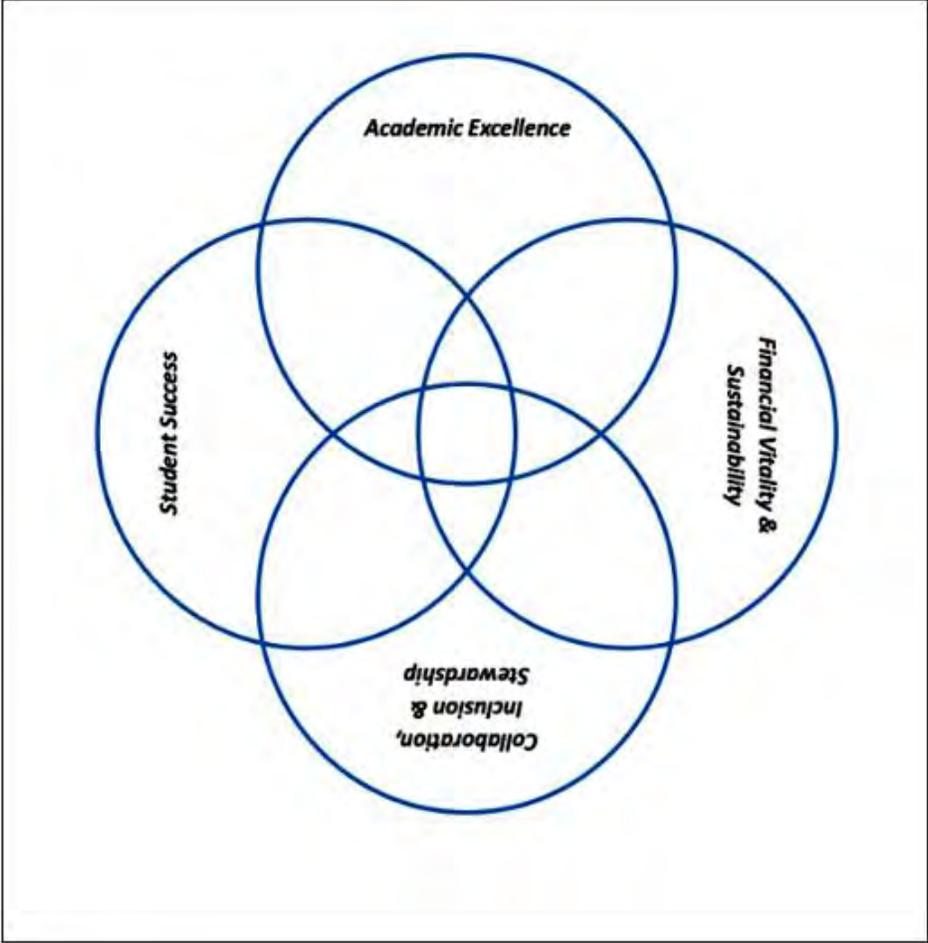
In November, we invited Dr. Susan Rankin to campus to help present the findings from our Campus Climate Survey, through a series of discussions with the campus community (see attached Exhibit C, Executive Summary). VP McBride assisted with this roll out and departed shortly thereafter. With VP McBride's departure, we filled the role with interim co-chairs Rebecca Comage and Professor Michael Mobley. They have assisted with the smooth transition and have helped me address some of the data driven change efforts recommended by Dr. Rankin including, enhancing the cultural competency for student faculty and staff and assessing the long-term role of the office.

b. Strategic Plan Approval

At the December 5, 2017, Strategic Planning Subcommittee of the BHE, I successfully presented and defended our proposed Strategic Plan, which was unanimously approved and recommended to the full BHE (see attached Exhibit D, Strategic Plan). On December 12, 2017, the full BHE also unanimously approved the plan. Provost Silva, Chief of Staff Bryant, and I also met with Secretary Peyser, Commissioner Santiago, and Tom Moreau to discuss implementation and assessment of the plan. While it has been suggested that Secretary Peyser has final sign-off authority on the plan, we feel that it is important to proceed as approved. We are working with our Collaboration Committee on both implementation and monitoring of our progress.

The Collaboration Committee, an advisory committee of administrators and faculty, was convened in 2016 to facilitate an inclusive process for collecting the campus community ideas and recommendations and distilling them into a four-year plan. The Committee led an intense and inclusive outreach process to ensure key stakeholders would have multiple opportunities to provide input to assure a shared vision and goals. During the fall of 2016, the SSU community participated in well over 2,000 touchpoints and engagement opportunities.

Dean Cambone (School of Education) recently described our strategic plan goals as inextricably linked – each being equally reliant on the other for success. I believe his Venn Diagram (below) simply and exquisitely displays our inherently related tasks. Ideally, four years hence, we will be able to report “mission accomplished” on all fronts.



c. Science Teaching Lab Addition (STLA)

In December, we finalized our proposal for the STLA and submitted the requisite supporting application and materials (see attached Exhibit E, STLA Summary). Prior to submission, I participated in our peer review presentation, which enabled us to improve our proposal in accordance with the new framework and guidelines. In recently speaking with Division of Capital Asset Management and Maintenance Commissioner Carol Gladstone, it is my understanding that their recommendation(s) have been forwarded to Administration and Finance for review. Presently, we are in full court press advocacy mode. Our North Shore Legislative Delegation has sent a letter of support to Governor Baker and Secretaries Peysner, Ash, and Heffernan. Senator Lovely and Representative Tucker are also arranging meetings with Governor Baker and Secretary Heffernan.

Progress on the DHE Big Three

a. Access

Salem State is committed to advancing access to college and addressing the cost problem in higher education. We have enthusiastically collaborated on Department of Higher Education access initiatives including: Transfer Pathways; STEM Policy; State University Transfer Principles; Commonwealth Commitment; Mass Colleges Online; and Dual Enrollment. Our collaboration with the community colleges has increased as Admissions visited community colleges more for transfer advising. We have established an Early College initiative with Salem High School and are in preliminary talks to extend the program to Lynn Public Schools. We have implemented financial literacy programs, enhanced financial aid messaging, and created a financial aid restructuring formula intended to better meet the needs of our low-income students. We have marketed the value and affordability of a Salem State education. Value and affordability are consistent themes emphasized in Admissions communications, marketing materials, and events. The quality and value of a Salem State education is demonstrated to prospective students and families through interactions with accessible, engaged faculty; learning about high quality internship and post-graduate job opportunities. Through comparing the costs of out

of pocket expenses, loans, and post-graduate debt with other institutions, students learn about the value and affordability of attending Salem State. Further, we have streamlined the transfer credit equivalency process and held early transfer registrations. We have been active in statewide recruitment events and providing Book Awards at our feeder high schools to promote access. Admissions created the Executive Director of Partnership Development and Outreach position to strengthen pathways from community colleges, community based organizations and high schools to Salem State.

We continued to expand flexible program options to better accommodate adult learners, including a fully online, ADA compliant graduate certificate in business that will launch in fall 2018.

We offered an innovative BS + Educator Licensure + MEd pathway program that is dramatically less expensive than traditional models and provides students with the opportunity to complete their masters' in an efficient manner.

As we continue to make efforts to enhance the student experience, we engaged in initiatives focusing on programs that improve international student satisfaction and engagement and promote a stronger sense of belonging and community. Highlights of our innovations this year are: International Peer Mentor Program, weekly coffee hours, bi-weekly faculty "cookies and conversation" sessions, apple picking trip in New Hampshire, International Student Association conference and community service planning, Intensive English Language Program collaboration with social work students, a community Thanksgiving dinner, and International Week daily events.

We rolled out a newly created mobile-first, ADA compliant website with the overarching goal of strategically marketing and positioning Salem State to prospective students with the goal of boosting college participation rates. This roll out has resulted in nearly 6.3 million unique viewers since its launch 11 months ago. This total reflects an increase of 1.38 million viewers or +22% more unique viewers than in the prior year. The site's overall analytics have also improved such as a 41% bounce rate which is excellent according to web standards. Moreover, we strengthened our brand presence and increased interest in academic programs

through innovative micro-outreach campaigns to specific audiences, in combination with strategic messaging and content strategies across all modalities. These campaigns support diversity and inclusion goals, reinforce community college partnerships, and educational opportunities for the regional workforce. Our click through rates average 2%; the industry standard is 0.22%.

b. Closing Achievement Gaps

We have doubled down on closing persistent achievement gaps:

- Partnered with MA Charter Schools and community-based organizations (e.g., One Goal, Bottom Line, Inversant) to create a pipeline and support for underserved populations.
- Increased on-the-spot admissions programs with Lynn Classical, Academy of the Pacific Rim, Malden, Revere, Lowell, Salem High School, and Salem Academy Charter School.
- Continued the cohort initiative to actively reach out to students who were not progressing at satisfactory levels and offered academic/financial support.
- Diversity and inclusion training was initiated on campus for faculty, administrators, and staff.
- In fall 2017, a Men of Color Learning Community was established. Eighteen students participated in the inaugural launch, with 100% retention this spring. Additionally, in fall 2017, a Women of Color First Year Seminar was established. Based on its success, a Women of Color Learning Community will be launched in fall 2018.
- Seven members of this Learning Community attended the Black, Brown and College Bound Conference in March. We recently had a positive meeting with a local foundation seeking support to continue this work.
- Continue to establish workforce partnerships to assist in promoting student achievement.
- Expanded peer mentor programs at the Bertolon School of Business to help students navigate academic requirements.
- Created “super” and “transfer” advisors to offer support for our most vulnerable students.

We were extremely proud to be recognized by the Education Trust as one of the top ten institutions closing the achievement gap for Latinx students. We have set an ambitious goal of eliminating the achievement gaps (black-white, Hispanic-white, male-female) for six-year graduation rates over the next four years.

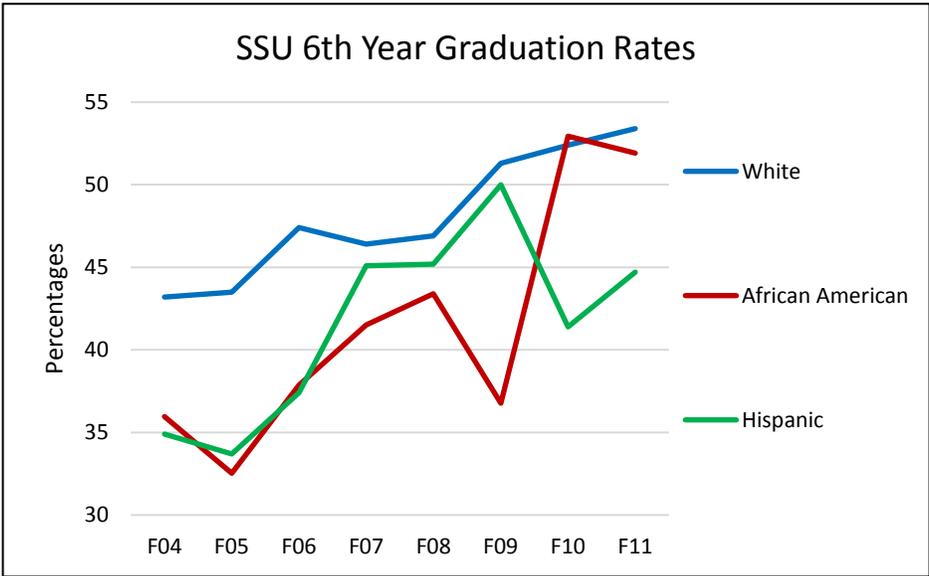
c. Completion/Success

Salem State is committed to increasing graduation and retention rates. We continue to increase the use of data to support evidence based decision making and to inform and evaluate programmatic effectiveness to improve student success. The TRIO, Student Transition and Engagement Program (STEP), and Summer Bridge programs serve an underrepresented student population including first generation, low income (high Pell eligible), racially diverse, and students with learning disabilities. The following are a few of the initiatives that we have created to meet this goal:

- Worked with Institutional Research to begin identifying data sets needed to examine the retention and graduation rates of various student populations.
- Utilized data to share information about student success based on the retention and graduation rates for TRIO and STEP students, which are currently above the averages for the general student population.
- Utilized data from Mapworks to understand student risk and emerging trends based on specific populations.
- First Year Experience (FYE) coordinated individual outreach to first year students several times throughout the year to form institutional connection with students and address issues/concerns.
- To improve college completion rates, we implemented best practices for student success initiatives (e.g., warnings/counseling when dropping a class, streamlined the Satisfactory Academic Progress appeal process).
- The Interdepartmental Collaborative was created bringing together university offices to focus on student progression.
- The add/drop policy was aligned for all students.
- Promoted 15 credits (per semester) to better educate students on the benefits of graduating in four years.
- Completed an internal/external assessment of admissions and financial aid.

- Completed Enrollment Management Operations staff changes to streamline and improve operational services, technology, and collaboration.
- Implemented Apps Anywhere which provides anytime, any device access to academic software.
- Convened a group to look at utilizing Open Educational Resources (OER) to reduce the cost of textbooks for students.

	Sixth Year Graduation Rates							
Student Race/Ethnicity	F04	F05	F06	F07	F08	F09	F10	F11
African American	36.0	32.5	37.9	41.5	43.4	36.8	52.9	51.9
Hispanic	34.9	33.7	37.4	45.1	45.2	50.0	41.4	44.7
White	43.2	43.5	47.4	46.4	46.9	51.3	52.4	53.4



Campus Safety and Violence Prevention (CSVP)

Campus safety and violence prevention remain top priorities. We have implemented the DHE’s best practices for Campus Safety and Violence Prevention with the introduction of (online) Active Shooter Response Training and Preventing Discrimination and Sexual Violence Training. In addition, the Care and Concern team discusses students of concern and protocols with the deans, the Center for Academic Excellence (CAE), FYE, and Disability Services. The Prevention Taskforce

was developed to coordinate efforts; assess effectiveness; recommend tools; and comply with government mandates.

We convened a Bias Response Team to develop and implement a Bias Incident reporting guidance protocol. Chief of Staff Bryant along with Police Chief Labonte convened an Emergency Preparedness, Event policy and Expressive Activities policy review. We have made significant outreach for victims of sexual violence through the Prevention Education Advocacy Response (PEAR) program which is funded by a \$3M Department of Justice grant through 2018. A grant reapplication has been filed for this program.

Campus police procured and have encouraged members of our community to download Rave and the Rave Guardian app (connect users to police with the touch of a button and users can build their own network of guardian alerts). Improvements were also made to video surveillance infrastructure, and e-phones were added to parts of the campus.

We are transferring the management of all study abroad and faculty-led trips to the Center for International Education with the goal of implementing TerraDotta as a travel management platform in AY19 which would significantly enhance the management of study and travel abroad and improve communications.

Increasing Diversity in Leadership Positions

Salem State is committed to seeking academic excellence while continuously striving to be a welcoming, inclusive, and diverse campus. Increasing diversity in leadership positions remains a university priority.

- We have continued to work closely with Black, Brown and Proud (BBP), a student group, regarding their concerns about the office of Inclusive Excellence.
- The Career Ladder initiative offers a transparent view of promotional advancement pathways within ITS and guides professional development investment.

- Human Resources (HR) collaborated with Inclusive Excellence to conduct equity reviews of all employment searches. HR presented a workshop on diversity and inclusion that saw a capacity crowd of 50.
- Inclusive Excellence offered three professional development opportunities to enhance cultural competency; “Culture Coaching: the Power to Transform Leaders and Institutional Climate,” “Anti-Bias and Diversity Training for SSU Police,” and the “Train the Trainer” program.

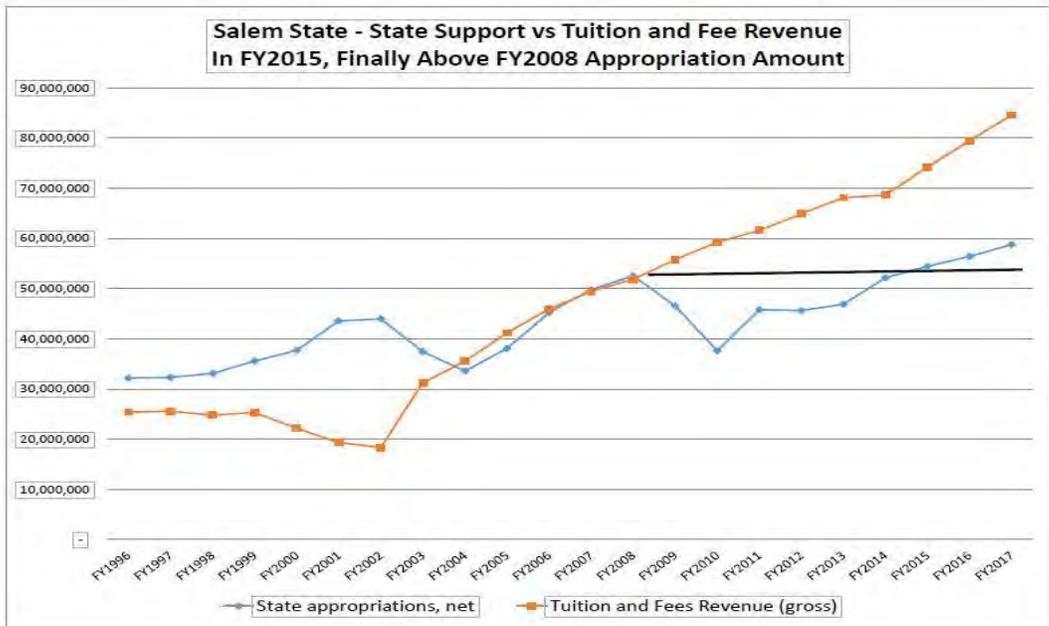
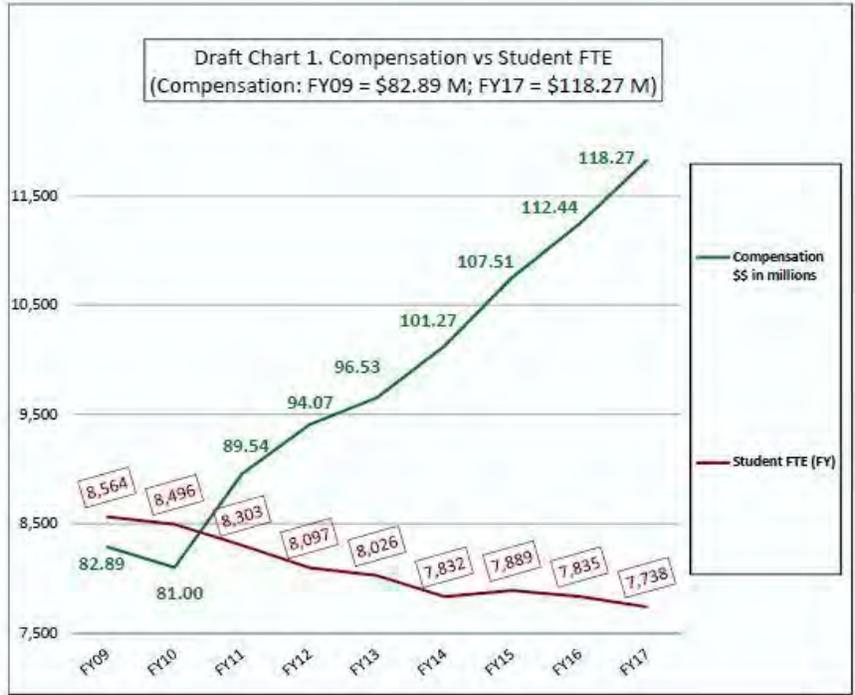
In conjunction, with Board Chair Mattera, we have quite successfully advocated to the Baker Administration to increase Board diversity. Not resting on our laurels where we saw an increase in faculty of color from eight to twenty-three in FY18, we continue to be deliberate in our faculty searches and hope to continue our momentum of increasing the diversity of our faculty for FY19.

Progress on our Strategic Plan

a. Financial Vitality

Our success is dependent on just three words: enrollment, enrollment, enrollment! The charts below depict our challenge – declining enrollment over the past several years, increasing compensation costs and flat state appropriations. We are making every effort to turn this around. If not successful, we will need to reconsider the “true” size of enrollment and make appropriate adjustments to achieve financial vitality.

Draft Chart 1. Total FY Compensation (Salaries/Wages and Fringe Benefits) vs FY Student FTE									
	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
Annual Student FTE	8,564	8,496	8,303	8,097	8,026	7,832	7,889	7,835	7,738
Compensation (\$\$ in millions)	82.89	81.00	89.54	94.07	96.53	101.27	107.51	112.44	118.27



The university's focused enrollment strategy will help to fuel its financial vitality as we continue to turn today's challenges into tomorrow's opportunities.

- Our Marketing and Creative Services department undertook an in-depth analysis of academic programs to determine areas of potential enrollment growth. Studying marketplace degree completion rates, student demand, regional and national job openings, and competitor analysis, produced independent data to guide resource allocations.
- Enrollment Management, Marketing and Creative Services, Center for International Education (CIE) and School of Continuing and Professional Studies (SCPS) collaborated to raise enrollments.
- We implemented a new financial aid leveraging model to provide financial support and increase yield.
- We worked to build a junior, senior strategy to increase inquiries, applications, and admits.
- We enhanced the recruitment and communication strategy to increase applications.
- We have been more intentional in utilizing institutional reports and dashboards as part of our business intelligence and data analytics systems. This reporting and real-time information will become the basis for more informed decision-making.
- Academic Affairs is actively working with enrollment management and marketing to grow student enrollments, particularly adult learners in SCPS. Specific program growth areas include Nurse Practitioner and accelerated Bachelor of Science in Nursing (ABSN), Occupational Therapy (direct entry), Teacher Leadership, and Accounting. In addition, Healthcare Studies and Social Work continue to see increases in enrollment.
- While international enrollments (with 245 F-1 visas and 40 J-1 visa students in 2017) remains a strength versus peer state institutions, our numbers are down significantly since our recent peak (500). We are working to implement Canvas Catalog (an add on to our existing Canvas software) which will greatly facilitate our ability for non-SSU students to take classes.
- A revision to our long-term agreement with Reitaku University in Japan now includes a monetary incentive; we will be welcoming our first 1+2+1 "experimental" cohort from Nanjing Normal University in China this fall, as 14 students become English majors with the option of continuing into our MA

TESOL program; we are finalizing an agreement with Shaanxi Normal University in China to host an intensive two-week teacher training program this summer with the intent of establishing a long-term relationship; we have agreements in discussion with Daito Bunka University in Japan to send students to our Intensive English Language Program and with Shenzhen University in China to also send students to SSU for short-term language/culture programs.

- We successfully obtained a \$40,000 grant from the National Endowment for Humanities (Roopika Risam, English; Susan Edwards, Library) to host leaders from digital humanities programs from other regional comprehensive universities to collaborate on developing a national network of practitioners.
- The university continues to develop strategic revenue building partnerships such as Cat Cove Clam Seedlings and potential Mussel production.
- To increase state and federal grants, we have restructured the area of Sponsored Programs and Research.
- On the heels of our successful 10,000 Reasons Comprehensive Campaign, broad fundraising commitments continue. The total raised to-date: \$1.37million of \$2 million goal for FY18. Major and planned giving grew to \$266,407 for the 50th reunion class (previous average \$44,242).
- Recognizing the need to identify new sources of revenue, we partnered with Capstone On-Campus Management to help us better utilize residence halls and other spaces on campus that remain largely vacant during the summer. This partnership represents an innovative approach to supporting our goal of financial vitality.

b. Collaboration, Inclusiveness and Stewardship – Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship.

My introduction into the presidency came at a time when students across the country began to more vocally; express their concern over the increased incidents of racist and discriminatory acts on college campuses. Salem State was not immune to this as we saw acts of hate (vandalism) on our campus. This prompted me to encourage open and honest conversations about diversity and inclusion from our students, faculty, and staff. I was particularly impressed with our students. They expressed themselves in a manner that made me proud to be their

president and to commit myself to making Salem State a welcoming and inclusive campus. Fortunately, we had already begun a comprehensive campus climate study, beginning with a campus-wide survey. This spring, the Climate Study Implementation Team (CSIT) reviewed the results of the survey and held numerous focus groups to allow further input. I look forward to CSIT presenting their findings to the campus community.

- We are making a concerted effort to increase diversity within the Honors Program by being more intentional in our outreach to students of color. For example, a congratulatory postcard was sent to all first year students of color with a 3.5+ GPA at the end of their first semester. The postcard invited them to attend an informational breakfast and learn about the many benefits of the program.
- The Center for Academic Excellence (CAE) is actively collaborating with all areas within the University to improve/promote student success. For example, CAE staff has been meeting with department chairs to improve collaboration and better meet student and faculty needs.
- Retention services has created liaisons for each academic area, which has resulted in better usage and engagement of Mapworks from faculty and staff.
- Center for Teaching Innovation facilitated several book groups with faculty and staff that focused on racism and microaggressions. Some of the materials used included the following books: *35 Dumb Things Well-Intended People Say* and *Race Talk: the Conspiracy of Silence*.
- The School of Graduate Studies is working with The National Park Service on an MOU. The MOU also includes the Salem Maritime and Saugus Iron Works. This agreement will focus on civic engagement activities for students, faculty, and staff.
- Our mission to increase support for faculty and staff initiatives through private foundations and corporate funding yielded positive results. Some of the initiatives that received private funding include The Upward Bound Program, via the Rogers Family Foundation Grant; Salem High School Mentorship Program, via The Boston Foundation and; The Center for Holocaust and Genocide Studies, via Combined Jewish Philanthropies.

- Launched 16 Crowdfunding projects covering a variety of departments and programs across campus to increase fundraising for designated project. Some of the projects include:
 - Helped the Latin American Student Organization fund their Puerto Rico Community Service Trip over Spring Break
 - Students in the First Year Seminar on Philanthropy raised money for the university's food pantry
 - Endowed the Arlene Greenstein Study Abroad Scholarship which affords qualified SSU students the opportunity to visit another country through short-term or extended experiences. Dr. Greenstein was a former SSU dean.
 - Raised funds for materials for the Vikings Build-A-Bed Challenge – partnership with SSU Center for Civic Engagement, A Bed For Every Child, The Massachusetts Coalition for the Homeless, and St. Jean's Credit Union – where students built 50 beds for children in the North Shore area.
- Institutional Advancement expanded its partnership with Office of Career Services (OCS) to better align corporate partnerships and maximize gift potential.
- Maximizing SSU's investment in the Youth at Risk conference, collaborated with Admissions, Graduate School, Career Services, Alumni Relations, Center for Children and Youth Studies, and Inclusive Excellence.
- Published three print publications; Fall Statement, focusing on 10 years of excellence; Impact, winter donor magazine; and Spring Statement, showcasing the university's entrepreneurship.
- We continue our work with external stakeholders with an emphasis on fund raising, influencing policy, and advancing the reputation of the university. Working with our sister institutions, we advocate for support for public higher education with the administration and legislature, with particular attention to maintaining affordability for our students. We also remain heavily involved with regional business and community partners to generate increased opportunities for our students and faculty within their fields of interest, to better align our programming with the workforce needs of the region, and to advance the region's cultural, social and economic development.

- Many of our faculty and staff serve on boards and committees throughout the region, providing expertise to the business and nonprofit worlds. In my role as president, I share this responsibility by serving on the following boards:
 - Council of State University Presidents
 - Essex County Community Foundation County Leadership Council
 - New England Council
 - Northeast Arc Advisory Board
 - North Shore Advisory Board of the Anti-Defamation League
 - North Shore Alliance for Economic Development
 - North Shore Chamber of Commerce
 - North Shore Workforce Investment Board
 - Salem for All Ages Leadership Council
 - Salem Partnership
 - SSU Assistance Corporation
 - Voices Against Injustice (formerly Salem Award Foundation)

c. Academic Excellence: Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society.

2017-2018 has been a productive year with many advances in Academic Excellence. With the leadership of Provost Silva we introduced several new programs and innovative educational experiences for our students:

- Implementation of self-check tools allowing faculty to check their Canvas courses for ADA compliance in self-paced format.
- Department Class Scheduling will produce adjunct faculty budget projections, personnel costs savings, and streamline course planning.
- Online tracking of adjunct faculty evaluation streamlines the process and increases access.
- The Information Technology Services department is creating a student/faculty hub to showcase and promote academic research.

- New Programs:
 - New programs in School Adjustment Counseling
 - MS in Accounting
 - MS in Athletic Training (BHE recently approved)
 - Online Graduate Certificate in Business (effective fall 2018)
 - Seeking a new Bachelor of Science in Information Technology
 - Working toward a doctoral program in Occupational Therapy
- Innovative Educational Experiences:
 - SSU has been selected to join the Howard Hughes Medical Institute Science Education Alliance's Phage Hunters Advancing Genomics and Evolutionary Science program effective AY19.
 - SSU Library is now a member of the City of Salem's Preservation Partners, a group of local organizations committed to preserving Salem's unique history.
 - SSU was granted a license to hold our first ever TEDxSalemStateUniversity, an event that will be held in September 2018 and will showcase faculty thought-leadership within multiple disciplines.
 - SSU will be hosting the Summer 2018 Project Kaleidoscope meeting of the Massachusetts Region sharing best practices in STEM pedagogy.
 - Summer at Salem State will offer a special series of community events in celebration of the 350th anniversary of The House of the Seven Gables and the literary contributions of Nathaniel Hawthorne.
- Faculty achievements increase our students' educational experiences. A few highlights include:
 - Keja Valens (English) was awarded the 2017 Sylvia Rivera Award in Transgender Studies.
 - Zlatinka Blaber (Accounting and Finance) was awarded a Japan Studies Institute Fellowship organized by the American Association of State Colleges and Universities.
 - Bethany Jay (History) played a central role in the Southern Poverty Law Center Report detailing the insufficiencies of teaching the history of American slavery.
 - David Gow (Psychology) presented at the prestigious Boston HUBweek.

- Cameron Beatty (Education) was awarded the Emerging Scholars Award from the American Personnel Association-College Student Educators International.
- Professional Development: Offered faculty workshops on teaching for equity and diversity; workshops for 100% online programs and online course design; general education courses in Diversity, Power Dynamics, and Social Justice; and faculty learning communities focused on student centered teaching and inclusive excellence.
- Worked with the Biology Department to secure \$127,500 with current funding and planned giving support for student research projects at Cat Cove.
- Secured funding for the Bloomberg Lab terminals totaling over \$200,000.
- Organized the Youth at Risk professional development conference that welcomed over 800 area professionals.
- In partnership with the Center for Creative and Performing Arts (CCPA), theatre department, School of Education and School of Social Work, hosted seven professional development workshops and networking programs.

d. Student Success – Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals.

Academic Affairs has increased student involvement in authentic research experiences with faculty across disciplines. Over the past five years, we have seen increased growth in student participation in both Undergraduate and Graduate Research Days. We have also experienced an increase in our student participation and presentations at regional and national conferences, including: Kennedy Center’s American College Theater Festival; Eastern Sociological Society Annual Meeting; Occupational Therapy 15Th Annual Student Research Day; Massachusetts Statewide Undergraduate Research Conference; and the Black, Brown & College Bound Summit.

Internships allow our students the opportunity to gain relevant learning experience in a workplace environment. To that end, an internship task force was formed to promote better collaboration between our Office of Career Services and academic

programs. Further, the task force will identify best practices that promote rewarding internship experiences.

Executive Vice President Scott James has worked to restructure positions to better serve our students by aligning offices more closely, creating efficiencies, and providing more hands-on staff to work with students. As part of the restructuring, the former director of Student Involvement and Activities (SIA) has assumed the role of director of Residence Life and Student Life Operations. Diversity and Multicultural Affairs combined with SIA and created the Leadership Engagement Advocacy Diversity (LEAD) Office, to address the call for more embedded social justice education in the leadership development of our students. With the reallocated funds, LEAD added a program coordinator for LGBTQIA, and elevated an assistant to an associate director.

Athletics is also reallocating funds, converting more coaches to full-time employees with added administrative duties, to aid in recruiting new coaches and student-athletes. Coaches will assume more responsibility for students' academic success by overseeing Mapworks; developing study halls; and identifying and removing barriers to persistence. Another example of hands-on staff created from reallocated funds is the coordinator for student transition, who will assist with orientation and the development of a coaching model for all new students, and creating collaborations across campus.

Student Life (SL) has been organized into three clusters that allow staff to develop synergy, maximize resources, and focus on reaching depth in high impact practices. As the SL curriculum continues to develop, three-dimensions of learning and development were identified as the foundation for our work: Courageous Leadership; Self-Authorship; and Community Development. Articulated knowledge and abilities were identified with the expectation that students will go from beginner to expert on each dimension. The clusters will create coordinated programming to develop these dimensions in each student. In concert with Academic Affairs, this work will be at the center of the coaching model for all students.

I applaud the work of Cynthia McGurren, our Vice President for Institutional Advancement who has prioritized identifying resources for our underserved students and has been directly involved in fostering professional development opportunities for many of our students:

- A collaboration including CCPA, theatre department, School of Education and School of Social Work, resulted in seven professional development workshops and networking programs.
- The continued partnership with the Bertolon School of Business and Career Services helped to create a job shadowing program, which will launch in the fall of 2018.
- Identified, solicited and secured over \$100,000 in funding in support of my inauguration. Proceeds not used to cover the inauguration (in excess of \$50,000) will be used for scholarships to assist underrepresented students.
- Student Philanthropy Council/Senior Class Gift program leveraged peer-to-peer outreach to educate current students on philanthropy and giving back to their communities.
- A collaboration including the Latin American Student Organization (LASO), Student Advocacy Office, and Student Community Service Group developed fundraising initiatives.

CONCLUSION

While still not through my first full year, quite a start it has been indeed. With each and every day, I am more confident in our ability to meet the increasingly complex challenges facing higher education and deliver for our students an inclusive, excellent, affordable, civically engaged and globally aware education. They deserve no less.

I look forward to working with the BOT and our entire campus team on these goals and priorities during AY 2018-2019.

AY 2018-2019 Goals and Priorities:

- ✓ Increase enrollment +100 students;
- ✓ Obtain funding for STLA;
- ✓ Initiate/plan new comprehensive fundraising campaign;

- ✓ Increase additional auxiliary revenues (summer housing);
- ✓ Gain approval of Occupational Therapy Doctorate (clinical);
- ✓ Gain approval of our BS in IT;
- ✓ Evaluate “online” initiatives/collaborations;
- ✓ Seek “control” of strategic Canal Street properties;
- ✓ Hire a new permanent VP for Diversity and Inclusion;
- ✓ Build on our concerted efforts to increase faculty of color;
- ✓ Continue making positive gains toward closing the achievement gaps;
- ✓ Draft Cat Cove business plan and evaluate private collaborations.



PRESIDENT
Leadership Profile



Contents

Welcome	1
At a Glance	2
The Opportunity	3
Salem State University: An Overview	4
Indicators of 21st Century Growth	5
Points of Pride	6
The Role of the President	8
Opportunities for Presidential Leadership	9
Qualities and Qualifications of the Ideal Candidate	12
The University	14
Serving the Community and Region	22
About the City of Salem	24
Procedure for Candidacy	

Welcome

Dear Prospective Candidate,

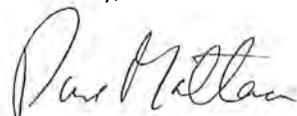
Thank you for your interest in Salem State University's presidential search. As the chairs of the Board of Trustees and the Presidential Search Committee, we invite you to explore this leadership profile and the university's website which will give you a better feel for the campus and its mission. We have high expectations for our 14th president and are confident that this prospectus helps paint the picture of Salem State's trajectory of excellence.

Over the last ten years, Salem State has grown and matured in many ways, including growth in the physical campus, increased diversity and graduation rates, expansion of academic programs, improvements in student life and successful completion of a \$25 million fundraising campaign. As the university has evolved to reflect our global society, we remain committed to our mission, values and heritage and to our strong partnership with the exciting, historic city of Salem, Massachusetts. Today, Salem State University is a flagship of the higher education system in the Commonwealth of Massachusetts, and we remain committed to affordability and accessibility for first generation college students.

Opportunities abound for a new president to continue this forward momentum, to boost private philanthropy, to further expand the university's infrastructure, to strengthen our partnerships with the region and to set a strategic direction for this great institution. Simply stated, Salem State University's foundation is exceptionally strong. If you are a remarkable leader who will propel this institution into the future, we would like to hear from you.

We appreciate your interest in this position and wish you the best as you begin your candidacy. Thank you for your consideration of Salem State University.

Sincerely,



Paul Mattera
Chair
Board of Trustees



Teresa Chisholm
Chair
Presidential Search Committee

At a Glance

Students

Salem State University is the most diverse public university in the Commonwealth with over 29 percent of the student population from underrepresented backgrounds.

9,000

Full-Time Faculty

Salem State's faculty represent a wide variety of academic institutions including the most prestigious in the country and the world. The university has been recognized twice in the past five years as being among the top producing institutions of Fulbright Scholars.

351

Graduation Rate

From 2007 to 2016, the graduation rate for baccalaureate students increased 15 percentage points—the largest change in the state university system.

52%

Campus Investment

Over the past decade, nearly 760,000 square feet of new construction and renovations have been made, bringing state-of-the-art academic and student life spaces to campus.

760,000
square feet

10,000 Reasons Campaign

Salem State University completed its first comprehensive fundraising campaign exceeding its \$25 million goal by more than a million dollars.

\$26
million



The Opportunity

Salem State University seeks a visionary and collaborative president to build on its history of success and lead the university to the next level of achievement.

Salem State is on the move. Designated a university in 2010, our campus has been energized by new state-of-the-art facilities, an increase in freshmen applications, improved student graduation and retention rates, growing alumni engagement, talented leadership throughout the organization and an expanding role in the region.

Located just 15 miles north of Boston, Salem State is one of the largest and most diverse state universities in the Commonwealth of Massachusetts and is an important partner in the economic, cultural and intellectual vitality of the greater north-of-Boston region. Situated in the historic seacoast city of Salem, Massachusetts on more than 115 acres and five campuses, Salem State provides a diverse community of over 9,000 students, a high quality, student-centered education; one that prepares them to contribute responsibly and creatively to a global society and to serve as a resource to advance the region's cultural, social and economic development.

The university supports a full-time faculty of over 350 and offers 32 undergraduate degree programs in the liberal arts, human services and business, along with graduate programs that offer degrees in 24 fields such as education, science, humanities, business, criminal justice, and nursing, among others. The university also has a continuing education division that offers both credit and non-credit programs.

Salem State's faculty represent a wide variety of academic institutions including the most prestigious in the country and the world. The university has been recognized twice in the past five years as being among the top producing institutions of Fulbright Scholars. Faculty hold a deep commitment to teaching and learning and pride themselves on connecting with students at an individual level. Student learning opportunities are personal and collaborative, yet large enough to broaden students' understanding of their world.

The university's students hail from 28 states and 63 countries. The university is proud that 35 percent of its 2016 freshman class self-identified as being students of color. Salem State has over 65 student groups and clubs, 15 varsity teams along with intramural sports, and hundreds of student activities scheduled throughout the year. The university has a nationally award-winning residence life program. One-third of the undergraduate degree-seeking population, including two-thirds of the freshman class, lives on campus. More information about the university and the presidential search can be found at saalemstate.edu.

For information regarding how to express a candidacy or to make a nomination for this position, please see the section entitled "Procedure for Candidacy" at the end of this document.



Salem State University: An Overview

Salem State's 163-year history reflects the growth of its mission and its vital role in the nation, the Commonwealth and the local community. From its beginnings as a teaching college to the large, diverse and comprehensive academic institution it is today, the university has remained true to the value of its founders, and continually seeks a forward path, adapting to society's changing needs while ensuring the intellectual and material well-being of the North Shore region of Massachusetts and beyond.

Mission Statement

Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society, and serve as a resource to advance the region's cultural, social and economic development.

Vision

Salem State University will be a premier teaching university that engages students in an inspiring transformational educational experience.

- We put students first in all that we do and are committed to their success.
- We are a community of learners where all faculty, staff and students have the opportunity to grow as individuals.
- We are innovators, offering a unique brand of public higher education that inspires students to reach higher and achieve more.
- We remain true to our heritage as a liberal arts university while we prepare students for today's workforce.
- We serve the communities of the North Shore while we create an ever more globally aware and culturally diverse campus environment.

The Board and Department of Higher Education

Salem State University is part of the Massachusetts public higher education system, which is comprised of nine state universities, 15 community colleges and the five-campus University of Massachusetts System. Tasked with defining the mission of and coordinating the Commonwealth's system of public higher education, the Board of Higher Education (BHE) has a particular responsibility for the state universities and community colleges and broad oversight responsibility for the University of Massachusetts. The Department of Higher Education, headed by a Commissioner, is the executive arm of the Board of Higher Education. The Board participates in the appointment of community college and state university presidents, approves presidential appointments and sets presidential compensation. The Department of Higher Education is one of three agencies in the Commonwealth, and the Executive Office of Education facilitates communication and coordination between and among those three education agencies.

The BHE is responsible for establishing statewide, system goals for the state universities and community colleges. The BHE is currently reviewing existing statewide goals within the context of developing a statutorily mandated performance measurement system for public higher education institutions. Meanwhile, the existing statewide goals are embodied in the Vision Project, an initiative that aims toward national leadership in six key areas of educational work: (1) college participation; (2) college completion; (3) student learning; (4) workforce alignment; (5) closing achievement gaps; (6) educating citizens. Each year the BHE collects data tracking progress on these outcomes for each institution, and shares these data with presidents and campus boards. The BHE has also launched a major initiative to achieve cost savings through heightened collaboration among the colleges and universities and asks the individual colleges to participate in these efforts.

Indicators of 21st Century Growth

	2006	2016	CHANGE
Student FTE	7,225	7,226	0%
Resident Students (Housing capacity not students housed)	1,404	2,282	63%
Percent Students of Color	14.8%	29.4%	99%
Graduation Rate*	37%	52%	41%
Full-Time Faculty	320	351**	10%
Degrees Awarded	1,434	2,214	54%
Campus (number of buildings)	20	29	45%
Campus (total square feet)	1,152,221	2,046,328	78%
Total Revenues	\$106,813,338	\$163,958,382	53%
International Partnerships	3	25	733%
Community Service Hours	1,281	359,891	27995%
Percent of Students on Deans List	38%	44%	16%

*Data is from 2007 and 2017 (projected)

**2015 IPEDS data





Points of Pride



- **University Status** – In 2010, Salem State College became Salem State University, a legislated change in status which reflected the large, comprehensive institution the university had become. University status brought greater recognition to the high quality of Salem State’s academic programs and the many accomplishments of its faculty and students. With the university designation, Salem State expanded academic programming grounded in the expertise of its faculty and designed to address the changing needs of its community and workforce. Among many highlights, Salem State’s School of Social Work was ranked #91 (of over 250 programs) by *US News & World Report* in 2016 and is the highest ranked public program in Massachusetts.
- **Increased Graduation Rates** – Student success is Salem State’s key goal. From 2007 to 2016, the graduation rate for baccalaureate students increased 15 percentage points—the largest change in the state university system. Salem State’s six-year graduation rate for first-year freshmen increased from 37 percent in 2007 to 52 percent in 2016, with a graduation rate for transfer students at 67 percent. This growth reflects the exceptional efforts of faculty and staff to support students, and the university continues to set aggressive goals in the area of student success.
- **Diverse Community** – Salem State University is the most diverse public university in the Commonwealth with over 29 percent of the student population from underrepresented backgrounds. In addition, over 35 percent of students identify as first generation college students. Salem State is known for its culture of inclusion and, over the last five years, the university has expanded cultural and identity based programs and dialogues. Given population trends, the university is preparing to be a Hispanic Service Institution in future years. Salem State recently added a vice president of diversity and inclusion to the President’s Executive Council.

- **New State-of-the-Art Academic and Student Life Spaces** – Changes to the physical campus over the past decade are profound. Nearly 760,000 square feet of new construction and renovations have been completed or are underway, bringing state-of-the-art academic and student life spaces to campus. Through the support of the Commonwealth of Massachusetts and generous donors, combined with resources of the university’s operating budget, over \$250 million has been invested in campus improvements. Highlights of these changes include the Frederick E. Berry Library and Learning Commons, the Sophia Gordon Center for Creative and Performing Arts, the Harold E. and Marilyn J. Gassett Fitness Center, athletic fields and courts, and two residence halls that provide accommodations for nearly 900 students. Efforts are currently underway to secure the Commonwealth’s support for a new science facility to meet the strong demand for science, health care, and technology programming.

- **Residential Campus** – In recent years, Salem State has shifted from a commuter campus to a more residential campus. Currently, one-third of the undergraduate degree-seeking population lives on campus, one-third lives in local neighborhoods, and the remaining third commutes from home. In addition to new residential facilities, Salem State has also added a new student life co-curriculum.

- **A Successful Comprehensive Fundraising Campaign that Raised Over \$26 Million** – In December of 2016, Salem State announced the successful completion of the university’s first comprehensive campaign. Exceeding its \$25 million goal, over \$26 million was raised during the campaign from more than 11,000 donors, with a remarkable 93 percent participation rate among faculty and staff. The funds resulted in the establishment of 48 new scholarships for students and much needed financial support for academic programs.



The Role of the President

The president serves as the chief executive officer of Salem State University and is responsible for ensuring the university delivers high-quality, student-centered programs for a diverse community of learners, in accordance with the institution's mission.

The president reports to the **Board of Trustees**. Reporting to the president are the members of the **President's Executive Council (PEC)**:

- Provost and Academic Vice President
- Vice President of Enrollment Management, Student Life and Marketing
- Vice President for Finance and Business
- Vice President for Diversity and Inclusion
- General Counsel and Vice President of Administration
- Vice President of Institutional Advancement
- Executive Director of Strategic Planning and Decision Support
- Chief of Staff to the President

The president has an **office staff** of six full-time members, including:

- Chief of Staff to the President
- Director of External Affairs
- Director of Public Relations
- Executive Assistant and Secretary to the Board of Trustees
- Public Relations Associate
- Senior Assistant and Assistant Secretary to the Board of Trustees

Salem State's Leadership Cabinet members also work closely with the president and meet two times per semester. Members of the cabinet include senior academic and administrative staff across the institution. A full list of **cabinet members for academic year 2016-17** is available [here](#).

Additionally, the president serves as a member of the Council of Presidents of the Massachusetts State University System, along with the presidents of the eight other institutions in the Massachusetts State University System.



Opportunities for Presidential Leadership

Under the leadership of its current president, Salem State has thrived through historic changes in the regional and national landscapes for public higher education. Among its many achievements and distinctions, the university has recently begun to employ efficient planning processes tied to budget and measured by outcomes and data based dashboards. Having come to the end of its last strategic plan and celebrated the successful conclusion of a supporting comprehensive campaign, the university began a visioning and strategic planning process in fall 2016. The plan will be presented to the Board of Trustees in June 2017 for approval but will be open to revision after the review and input of the next president.

The next strategic plan has much on which to build. The university is a thriving and caring campus community distinguished by academic quality and achievement; a student-centered approach to teaching and learning; deep roots in the liberal arts tradition; a strong and enduring commitment to diversity and social justice dating back to the university's connections with early abolitionists; dedicated faculty, staff and students who strive to do and be their best; and accomplished alumni who are making a difference in their professions, their communities, and the wider world.

Undergraduate education is the cornerstone of Salem State's mission. Alumni speak passionately about the transformational experience that the university provides to its students, the more than 35 percent of whom are first generation college students. Salem State is committed now and for the future to its liberal arts heritage, academic freedom, equity and access, affordability, inclusivity, social justice, student-centeredness, and a sense of community that gives it a small-college feel in a university setting. The university's colleges educate and empower Salem State's students to become responsible global citizens and contributors to the regional community and economy.

Recent investments in student services and support, campus life, and new residence halls, as well as a continued commitment by faculty and staff to student success have been responsible for a significant rise in retention and graduation rates, and especially so among underrepresented populations. The university also has a long history of offering excellent graduate education. The programs in the graduate school include some of the largest in the university and have a major influence on preparing the workforce in the Commonwealth. Graduate education supports the strong undergraduate experience at Salem State, and the university seeks to expand its graduate education capacity moving forward.

The university's strategic plan will leverage a number of strengths:

- Salem State will continue to be a thriving, welcoming, inclusive, adaptive university that graduates civically minded, socially conscious individuals ready to tackle whatever challenge comes their way; they will be motivated to engage in addressing societal problems that affect the common good and well prepared to succeed and lead in their careers and communities.
- Salem State will continue its impressive gains in retention and completion rates, closing the achievement gap between majority and under-represented student populations, and doing its part to meet the evolving workforce needs of our state and region.
- The university will continue to grow in recognition and respect for its innovative thought leadership, for its leadership in the realm of diversity and inclusion, and for championing causes of social justice.
- Salem State will leverage its location in historic Salem, on the North Shore of Massachusetts and in close proximity to the state's capital, in ways that both enhance the educational experience of students and contribute significantly to regional health and prosperity.
- As a result of effective fiscal planning, asset management, financial efficiency and fundraising, Salem State will grow more financially stable and invest more fully in its mission, in its students, and in realizing its potential as a great public university.

Key Presidential Priorities

Strategic Focus

- The university's strategic plan will provide the next president and the university community a set of priorities for moving forward, along with the flexibility and room to bring those priorities to life through strategic implementation. Given regional and state demographics and public higher education's resource constrained environment, it will be important for the president and university community to agree quickly on a clear, concise and realistic vision and focus to guide decision making, specifically around which current and future initiatives fit within the vision and should be moved forward.
- The new president will be expected to work collaboratively across the university to strengthen Salem State's financial foundation, align resources with priorities, and foster innovation and continuous improvement in all areas of the university.
- The new president will be expected to work collaboratively across the state's public higher education system and improve the institution's performance on each of the key statewide system goals identified by the Board of Trustees and Department of Higher Education.
- Given the university's current contractual and debt obligations, revenue growth is essential to support current and new strategic initiatives. In addition to fundraising, the greatest potential exists in the following areas:
 - Graduate and continuing education enrollment
 - Public private partnerships
 - Campus utilization—emerging opportunities exist to more fully leverage campus space year-round

Academic Excellence and Student Success

- Salem State prides itself on a long tradition and commitment to excellence in the liberal arts and sciences and complementary graduate programs. The university needs to continue to develop and support high-quality academic programs, outstanding faculty, and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce, rapidly changing economy, and increasingly complex and global society.
- As the most diverse campus among Massachusetts' nine state universities, Salem State must create a challenging and supportive learning environment that fully engages all students in their learning and promotes attainment of academic, personal and career goals.
- The university's continued investment in undergraduate student engagement and residential programming has paid off with increasing retention and persistence rates and a robust campus life environment. Given regional demographics, undergraduate enrollment is expected to stay level. However, graduate and continuing education enrollment offers significant potential for enrollment and revenue growth and needs strategic leadership to make that happen. In addition, in 2017 the university is seeking approval for doctoral education.
- Among the university's immediate priorities is the successful conclusion of an Association to Advance Collegiate Schools of Business (AACSB) accreditation process for the Bertolon School of Business.

University Advancement

- The president must be an active external representative and fundraiser for the university, building on the success of the recent comprehensive campaign and focusing on better engaging the university's vibrant alumni community to foster a culture of philanthropy.
- Among Salem State's hallmarks is its leadership in civic engagement through real-world learning opportunities, service to the community, and collaboration in the cultural, social and economic development of the region and state. The next president is expected to continue to model and promote civic engagement.
- Salem State has been steadily increasing public awareness of its academic strengths, institutional distinctions, and achievements and contributions of the university's faculty, staff, students, and graduates. More work needs to be done at the state level to advocate for investment in public higher education and, particularly, in Salem State's unique blend of programs and role in workforce development and cultural contributions to the region. The president will be a partner with the external local and regional communities and will serve not only Salem State's internal constituents, but also play a key role as a visible leader and advocate for public higher education in the Commonwealth of Massachusetts.

Community and Team Building

- The president of Salem State plays an important visible, internal role in building a culture of collaboration, teamwork, integrity and respect.
- Like many institutions of public higher education across the country, Salem State is improving its ability to foster a university-wide culture of excellence, accountability, collaboration and inclusion that attracts and retains talented, diverse faculty and staff committed to student success and university goals. The next president will inherit a strong, talented senior leadership team that is committed to incorporating contemporary best practices in the university's management functions. The community is committed to the principles and practice of shared governance and seeks a president who will support efforts to increase effective engagement and involvement of university constituents in strategic decision processes.
- Salem State University's culture and history as a tightly knit community has been tested by the changing external landscape. A president who can embrace and build trust with this community, communicate with transparency about the challenges and choices ahead, and invite broad participation would be welcome.
- As the institution evolves, it is critical that the university invest in and open access to internal professional leadership opportunities. Utilization, retention and celebration of talented faculty and staff are essential to the success of the organization.
- The diversity and active engagement of Salem State's student body are among the institution's unique strengths. Though the university has historically had a diverse population, the student body has become significantly more diverse over the last ten years, and in 2016, it hired its first Vice President for Diversity and Inclusion. The university is currently undertaking a **campus climate study** to assess how students, faculty, and staff experience the current campus environment. The new president must continue to embrace Salem State's historical commitment to diversity, actively engaging in conversations with students, faculty, staff, and alumni about what diversity and inclusion means for the institution today. Additionally, more work can be done to continue to actively recruit and retain diverse faculty members who will reflect the growing diversity of the student body.

Modern, Safe and Sustainable Campus Environment

- Salem State has been making progress in providing up-to-date and environmentally friendly facilities (including new buildings being LEED certified silver or better), technology and infrastructure to meet evolving needs, advance teaching and learning, and attract high-quality faculty, staff and students. A campus master planning process is underway that will identify the most cost effective and value added improvements, as well as recommendations for consolidation and strategic use of its multiple campuses.

Qualities and Qualifications of the Ideal Candidate

Salem State's president will be a visionary and collaborative leader of people and programs with outstanding communication and interpersonal skills. Minimum qualifications include:

- An earned doctorate (including but not limited to a PhD, JD or EdD) coupled with substantial experience relevant to Salem State's mission and needs; in exceptional circumstances, an earned master's degree, coupled with substantial experience relevant to Salem State's mission and needs may satisfy minimum educational requirements.
- Substantial experience in a senior-management position in higher education, or outside higher education where such experience is deemed relevant to, and provides a basis for judging the candidate's capacity to serve as a college or university president.

To be successful, the president must also possess: the capacity to articulate and implement a shared vision; a commitment to shared governance; a record of successful administrative experience; and proven financial management skills. The ideal candidate will demonstrate a track record for creating and strengthening relationships with multiple stakeholders. Successful, hands-on experience with constituent relations and fund raising is essential.

In addition, the president should demonstrate the following preferred characteristics:

- Commitment to fostering excellence in teaching and research
- Entrepreneurial skill and willingness to take risks
- Evidence of significant fiscal responsibility, strong business and financial acumen, and creativity in maintaining a healthy financial position to support mission delivery
- Experience in and/or commitment to public higher education
- Prior executive-level experience
- Deep understanding of the current context of public higher education nationally
- Ability to lead change
- Data based decision-making approach that balances transparency and consultation with ability to make tough decisions
- Experience with and/or deep interest in student interaction and advocacy
- Commitment to fostering an open, accessible and diverse community
- Understanding of the role of faculty and staff, particularly in an institution guided by collective bargaining
- A collaborative and naturally consultative leadership style
- Ability to distill, reflect and articulate complex ideas and information to the university's constituents
- Ability to build effective partnerships with external constituents
- Ability to be a successful fundraiser for the university
- Charisma and an ability to share the institution's success stories with the broader community
- Ability to partner effectively with a public board of trustees
- Understanding of and ability to work effectively in the political landscape
- Blend of energy and stamina
- Ability to listen, build trust and move initiatives forward



The University

Salem State's academic structure is comprised of the College of Arts and Sciences, the College of Health and Human Services, the School of Education, the Bertolon School of Business, the School of Graduate Studies, and the School of Continuing and Professional Studies.

Salem State's top undergraduate majors include: business administration, nursing, education, criminal justice, biology, psychology, communications, sport and movement science, English, social work and history. The university's liberal arts model prepares students to think critically, communicate effectively and ready themselves to fulfill the demands of tomorrow's changing work force. They are assisted in this endeavor by a highly credentialed faculty.

Salem State's **School of Graduate Studies (SGS)** provides a graduate experience and a degree that helps students reach their goals. SGS offers degrees in 24 fields that allow students to earn master's degrees, graduate certificates, educator licensure, and a Certificate of Advanced Graduate Study (CAGS) in education. The disciplines include: Master of Arts, Master of Arts in Teaching, Master of Science, Master of Business Administration, Master of Science in Criminal Justice, Master of Education, Master of Science in Nursing, Master of Science in Occupational Therapy, and a full-time program in Master of Social Work (the only program of its kind among the Massachusetts state universities). SGS graduates become leaders in their professions and communities. Students apply what they learn in the classroom and through their original research to their jobs and develop professional networks with faculty and area workplaces.

The **College of Arts and Sciences (CAS)** is home to the university's general education curriculum, the cornerstone of the university's commitment to offer all students an academically rewarding and intellectually diverse education. CAS is home to 20 departments, such as art + design, theatre and speech communication, English, biology, chemistry and physics, computer science, world languages and cultures, history, economics, and geological sciences, to name but a few. It is important that all students explore ideas, test concepts, learn, grow, and most of all question. The college's goal is to offer its students the best academic preparation and degree possible.

The **College of Health and Human Services (CHHS)** houses four of Salem State's service-oriented programs: the schools of nursing and social work and the departments of criminal justice and occupational therapy. Each program blends academics and field-work so students graduate with a well-balanced education that prepares them to join the work force or pursue advanced degrees, which are offered in each of the programs. Recognizing the unique interdisciplinary nature of the respective professions, CHHS seeks to promote a humanistic, caring environment, which maximizes student potential and instills sensitivity to current social problems and issues.





The **Bertolon School of Business**, which honors the generosity of entrepreneur and alumnus Henry Bertolon '74 and his wife, Donna, instills in its undergraduate and graduate business majors the development of strong business skills, sound ethics and a global world view. As Salem State's largest undergraduate major, it attracts students—and faculty with diverse specialties—from across the region and throughout the world. Students pursue a number of majors within business including accounting and finance, marketing, management, and decision sciences.

The **School of Education**, the university's founding program, has nearly 20,000 graduates that are making a difference as public school teachers, early childhood professionals, counselors, higher education administrators, community educators, and nonprofit directors. Through a recently transformed curriculum, students have the opportunity to pursue the combined bachelor's and master's 4+1 program which is designed to send expertly prepared, experienced teachers into our public school classrooms. Promising careers in education abound in communities across the Commonwealth—from preschools, K-12 schools, universities, childcare centers, and afterschool programs to national parks, museums, group homes, health centers, and hospitals.

The **School of Continuing and Professional Studies (SCPS)** is home to part-time and off-campus undergraduate programs, Salem State Online, Summer at Salem State, and the Center for International Education. SCPS works closely with community and international partners, businesses, and other institutions of higher education to provide expanded access to Salem State's academic programs and resources. The university offers undergraduate degrees and international education programs in a wide range of disciplines, including business administration, nursing, psychology, and education.





Faculty

As of fall 2015, 91 percent of Salem State's 351 full-time faculty members held terminal degrees: 84 percent held doctorates and 7 percent of creative and performing arts faculty held MFAs, while 9 percent held master's degrees or the equivalent and, of these, six are currently enrolled in doctoral programs. Among full-time faculty members in 2015, 80 percent identified as white, non-Hispanic (compared to 90 percent in 2010) and 56 percent were female (compared to 53 percent in 2010). Of Salem State's part-time faculty, in 2015, 95 percent continued to identify as white, non-Hispanic, while the number of females increased to 61 percent (compared to 59 percent in 2010).

Students

For the fall of 2016, Salem State received over 6,000 applications from prospective first time undergraduate students, an increase of nearly 30 percent over the past five years. The acceptance rate was 74 percent, and the yield was 25 percent. A total of 1,145 first time freshmen enrolled, with 35 percent identifying as students of color, 65 percent women and 35 percent men. Salem State's students come from 28 states and 63 countries.

For transfer students, 752 new students enrolled with 38 percent identifying as students of color, 59 percent women and 41 percent men.

Overall, the undergraduate enrollment is 7,346 with 38 percent identifying as students of color, 59 percent women and 41 percent men.

Just over 37 percent of Salem State's eligible undergraduate students receive a Pell Grant. Eighty percent apply for financial aid, and 78 percent of all degree-seeking undergraduates receive some type of financial aid—grants, loans or scholarships. Approximately 35 percent are first generation college students.

At the graduate level, 358 new students enrolled in the fall of 2016 with 19 percent identifying as students of color, 76 percent women and 24 percent men.

Veterans and Active Military

Salem State is proud to be a Military Friendly School as identified by *G.I. Jobs*. The university has also been recognized as one of the "Best for Vets" by *Military Times*, as well as a Top College and University by Military Advancement Education. Salem State hosts a student veteran organization that was awarded "Chapter of the Month" in 2013. Salem State is a member of the Paul Revere Battalion of the Army ROTC Program, a group that includes MIT, Harvard, Wellesley, Gordon, Endicott, and Tufts Colleges/Universities. Approximately 250 veterans and active military are enrolled at Salem State.

Alumni

Salem State has over 60,000 living alumni, approximately 80 percent of whom are Massachusetts residents. The alumni association is a vibrant group of volunteers who have a leadership role in both friend and fundraising. There are a number of affinity groups to engage alumni, and over 50 alumni-based events each year. One member of the university's board of trustees is selected by the alumni association Board to represent the alumni on this governance entity.

Student Life and Enrollment Management

At Salem State, the area of student life is committed to helping students balance their academic, social and civic responsibilities with their own personal growth and development. Staff in student life are advocates for diversity and social justice, which is reflected in programs and services. The university has a very active student government, as well as over 65 student groups and clubs. Recently, student life has also:

- Increased its focus on student leadership and social justice
- Shifted to a "one stop" navigation center for students
- Grown Salem State's Greek life community
- Hired a new assistant vice president and dean of students who is restructuring student life to include an "Engagement Cluster," a "Wellness Cluster" and a "Student Experience and Transition Cluster"

Athletics and Recreation

Salem State offers its students a chance to compete in a variety of competitive intercollegiate conferences and intramural athletic clubs. With the addition of a state-of-the-arts fitness center, the Gassett Center, students enjoy 40,000 square feet of aerobic and strengthening space along with open areas for various classes and "pick-up" sports.

Salem State fields men's and women's teams in 15 sports; plus 10 intramural/club teams.

Athletic teams compete in the Eastern Collegiate Athletic Conference (ECAC) Division III, the Little East Conference (LEC), the Massachusetts State College Athletic Conference (MASCAC), the National Collegiate Athletic Conference (NCAA) Division III, and the New England College Athletic Conference (NECAC).

Intercollegiate Sports:

Baseball (m)	Lacrosse (m/w)
Basketball (m/w)	Soccer (m/w)
Field Hockey (w)	Softball (w)
Golf (m)	Tennis (m/w)
Ice Hockey (m/w)	Volleyball (w)



Governance

Salem State's board governance consists of an 11-person board of trustees. Nine trustees are appointed by the governor for five-year terms, renewable once; one alumni trustee is elected by the alumni association for a five-year term, renewable once; and a student trustee is elected by the student body for one year, renewable. Regular meetings of the board are held four times annually, and as needed.

In accordance with the laws of the Commonwealth and regulations enacted by the Massachusetts Board of Higher Education, the composition, duties and powers of the Salem State University Board of Trustees are articulated within the university's bylaws. The board is charged with the fiduciary management of the institution, including determination of fees, establishment of personnel management policy, staff services, and the general business of the institution. Among its responsibilities, the board appoints the president, subject to the approval of the Massachusetts Board of Higher Education; annually evaluates the president's performance and submits its review to the Board of Higher Education; adopts an annual plan of financial operation; awards degrees in approved fields; and develops the mission statement for the university consistent with the mission of the Commonwealth's system of public higher education and statewide, system goals established by the Board of Higher Education.

Salem State University operates under the principles of shared governance and is governed internally by a series of committees that represent the three campus constituencies: students, faculty and the university administration. Each committee focuses on a different aspect of the institution, recommending policy, advising the administration of community needs or concerns, and voting on committee business. Committees fall into two categories:

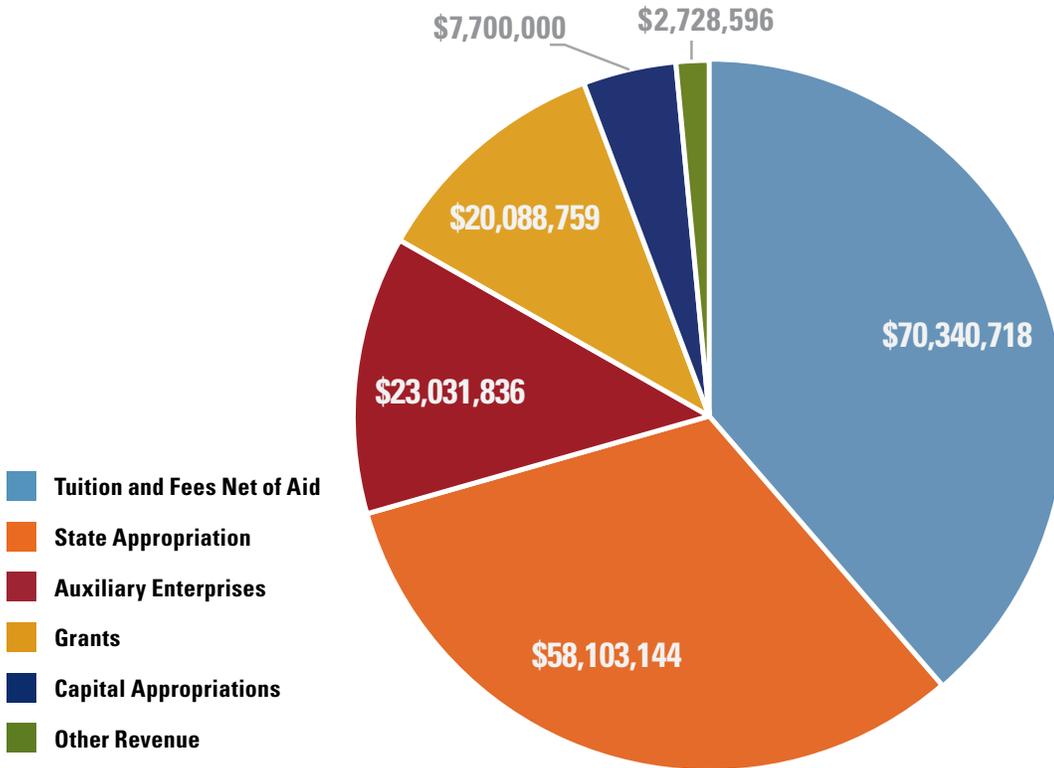
- University contract committees are required by contractual agreements for each state university. At Salem State they include academic policies, curriculum, library/media development, student affairs, and all-university, which acts as the primary agent for coordination and implementation of all contract committees, except for graduate education council, and makes recommendations to the president.
- Non-contract committees, which include both five committees required by law and 26 university advisory committees, are formed by the university president with representatives appointed by the faculty, administration and student government association.



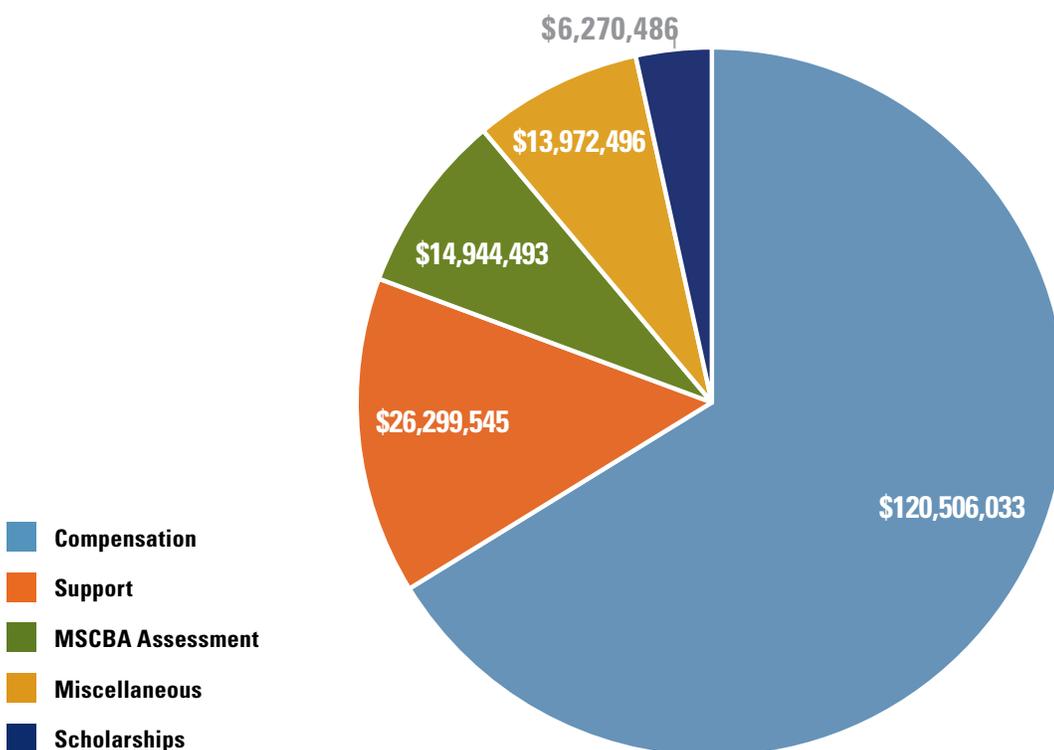
Resources

In 2017 Salem State University transitioned the scope of its budget from an operating budget to an all funds budget. The 2017 all-funds budget is \$182 million and includes the state direct unrestricted appropriation of \$44 million plus funding to pay for fringe benefits expenses, for employees covered by the state payroll, of \$13.9 million.

FY2017 Revenue Budget



FY2017 Expense Budget



The **Salem State Foundation** is a 501(c)(3) private, not-for-profit, tax-exempt organization that raises and manages charitable gifts in support of the university through active fundraising and advocacy. Working with the university and other partners, the foundation operates under the leadership of a **19-member board of directors** comprised of alumni and community leaders. The foundation is legally separate from the university. The foundation also works with university partners to:

- Manage a portfolio of \$27.3 million, with an endowment of \$25.7 million (as of December 31, 2016)
- Increase annual disbursements to academic and administrative departments
- Cultivate and steward a culture of philanthropy

The **Salem State University Assistance Corporation (SSUAC)** was created by a special act of the state legislature in 1994 to facilitate the physical campus growth and development of Salem State and to manage and operate the Enterprise Center. Through the SSUAC, Salem State has been able to build its Central Campus, Canal Street parking lot, purchase the Salem Diner (strategic acquisition), as well as several smaller real estate transactions. The Enterprise Center drives regional business through education, leadership, advocacy, community and economic development on the North Shore. It serves business owners, leaders and employees of companies of all sizes, in all industries and all stages of the business lifecycle. A vibrant component of economic development for the North Shore and beyond, the Enterprise Center also leads the North Shore Alliance for Economic Development and houses the Small Business Development Center and Massachusetts Center for Business Development for the region. The SSUAC owns and operates commercial rental properties. Salem State and the Enterprise Center have partnered to offer professional development courses and to promote entrepreneurship opportunities for our students. The SSUAC is legally separate from the university and the university is not financially accountable for the SSUAC.

The **Massachusetts State College Building Authority (MSCBA)** assists the nine state university campuses with the financing, planning, design, and construction of revenue generating buildings such as residence halls and student activity facilities. MSCBA also oversees the management of these facilities with regard to maintenance and renovations. Over the past ten years, MSCBA has supported the addition of two major residence halls, a large dining facility, the Gassett Fitness Center, the Sophia Gordon Center for Creative and Performing Arts, and a 700+ space parking garage.

Debt:	On-Book (Bonds and Note)	\$40 million
	MSCBA owned projects	\$202 million
	Leases	\$3.4 million

The **Division of Capital Asset Management and Maintenance (DCAMM)**, an agency within the Executive Office for Administration and Finance, is responsible for capital planning, major public building construction, facilities management, and real estate services for the Commonwealth of Massachusetts. In that role, DCAMM collaborates with all state colleges and universities on the construction, maintenance and renovation projects for academic spaces that are owned and funded by the Commonwealth. The most recent example of a DCAMM project at Salem State is the Frederick E. Berry Library and Learning Commons.

Collective Bargaining

Union representation at Salem State University includes three collective bargaining units:

- American Federation of State County and Municipal Employees (AFSCME)
- Association of Professional Administrators, Massachusetts Teachers Association (APA)
- Massachusetts State College Association, Massachusetts Teachers Association (MSCA)

More information on the collective bargaining agreements may be found at the web-site for the **Massachusetts Board of Higher Education**. The agreements are entered into by and between the Board of Higher Education, acting through the Council of Presidents of the State Universities, and the respective collective bargaining agents for members of the bargaining units.





Serving the Community and Region

Community service is one of the university's cornerstone activities. In FY14, students provided 429,510 hours of community service in the following categories: academic service-learning (2,106); forms of community service not including service learning students (608); total number of students who engaged in community service (2,714); and number of courses that integrate community service with academic content (260). Salem State helps support over 80 different local community service groups. Faculty and staff have also been involved with community partners in the planning of programs, and delivery of services and have led non-profits through the process of obtaining 501(c)3 status. For the past three years (2013, 2014, and 2015), Salem State has achieved the highest federal recognition possible for an institution of higher education, with placement on the President's Higher Education Community Service Honor Roll.

Positioned as a public good/resource, the university's collaboration with businesses on the North Shore and beyond have been extensive. University leadership is represented in the North Shore Chamber of Commerce as well as many of the city/town chambers of the region. Expertise of faculty and administration is sought in developing workforce educational programs through the North Shore Workforce Investment Board and business specific opportunities. Many academic service-learning experiences are based in the real needs of local non-profits or small businesses bringing much needed consultation to these entities. Through the Career Services Center, students are able to secure a wide range of internships and other work-related experiences.

Salem State has extensive partnerships with the school districts of the region including three laboratory schools. The Horace Mann Lab School, located on the university campus, is led (as principal) by a faculty member from the School of Education. The mutually beneficial collaborations allow Salem State to continually improve its educational offerings while bringing the benefit of research and resources to the school.

A leading institution in the north-of-Boston region, the university is the second largest employer in the city of Salem and one of the top five employers on the North Shore; 1,000 university employees live in Massachusetts; 177 reside in the city of Salem. The university generated more than \$827 million in economic spending in Massachusetts in FY14, over \$443 million of spending in Essex County and over \$100 million in the city of Salem. Salem Mayor Kimberley Driscoll '89 is an alumna, and the university and city enjoy a very close working relationship.



About the City of Salem

Founded in 1629, Salem, the “City of Peace”, is a small city with a big history. It is the second incorporated city in Massachusetts (April, 1836) and the second oldest settlement in New England (settled four years before the settlement of Boston).

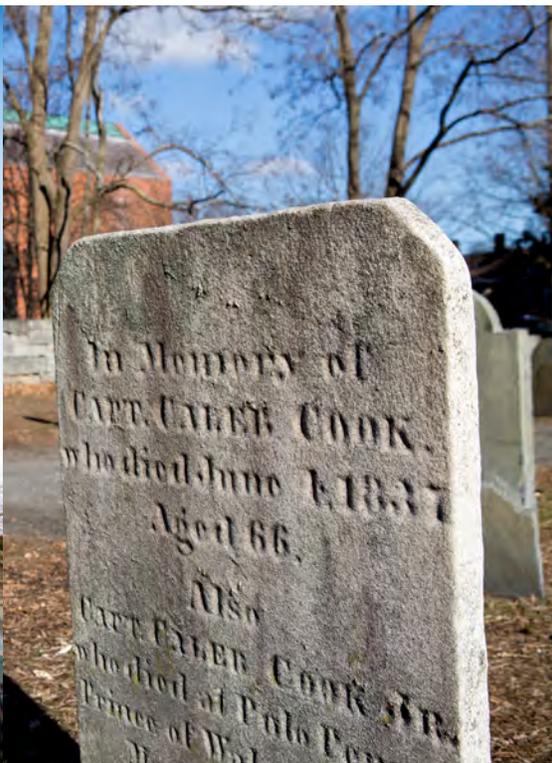
While Salem has been long known as the “Witch City” due to the notable witch trials of 1692, Salem also played a prominent part in Revolutionary times and was an active leader of several Massachusetts industries. In the early part of the 19th century, Salem’s ships were pioneers in the India trade and opened up commerce with Africa, China, Russia, Japan and Australia. In Salem are found mansions that belonged to some of the country’s first millionaires, the birthplace of celebrated author Nathaniel Hawthorne and 18.5 miles of tidal shoreline.

Salem is a vibrant, pedestrian-friendly city where its residents, and over a million tourists annually, can easily visit historic architecture, unique attractions, world famous museums, and an eclectic mix of shops and dining options. And, with easy access to public transportation—including direct access to Boston—Salem is a great city in which to live, work and study.

The university is located in the region of Salem known as South Salem and has strong ties to its neighborhood. After the purchase of the parcel now known as the Canal Street parking lot, the city’s mayor with the agreement of the university president re-established the Salem State University Neighborhood Advisory Committee (SSUNAC). The SSUNAC includes the city councilors serving South Salem, and representatives of the university and neighbors. The group meets monthly to update the community on work of the university and to discuss/ receive input into campus development. Additionally, the current president has regular meetings with the elected leadership of the city. The current process of communication has proved very beneficial in furthering the goal of the university to remain a good neighbor within its neighborhood.

The city, a leader in inclusiveness, has an active No Place For Hate Committee that includes members from the university community. The committee is dedicated to promoting acceptance of diversity and combating discrimination. It is dedicated to mobilizing citizens to challenge bigotry and to promote a prejudice-free community in which all people are respected, understood and appreciated for their differences. Their primary goal is to be a resource to the city of Salem by providing support and education on diversity issues. They seek to protect the promise of equal justice and civil rights for all members of the community.

Furthering its commitment to social justice, the Salem Award for Human Rights and Social Justice was established in 1992, the tercentenary of the Salem Witch Trials. The Salem Award Foundation’s mission is to recognize, honor and perpetuate the commitment to social justice and human rights of individuals and organizations whose work is proven to have alleviated discrimination or promoted tolerance. The university president serves as honorary co-chair of this award committee along with the mayor of the city.



Procedure for Candidacy

Interested candidates should review the Massachusetts Board of Higher Education Guidelines and Procedures for the Search, Selection, Appointment and Removal of State University and Community College Presidents. The Presidential Search Committee will preliminarily screen all applicants and recommend three to five finalists for further vetting by the Salem State University Board of Trustees and the Massachusetts Department of Higher Education. Finalists will be asked to participate in open campus meetings in May 2017. Final appointment is subject to background check and approval by the Massachusetts Board of Higher Education. The president is expected to begin on July 1, 2017.

Confidential inquiries, nominations, and applications are invited. Review of applications will begin immediately and continue until the position is filled. For best consideration, candidates should provide no later than March 31, 2017, a resume or CV, letter of application and the names and contact information of five references. References will not be contacted without prior knowledge and approval of candidates. These materials should be sent electronically via email to Salem State University's consultant, Lucy Leske, at SalemStatePres@wittkiewfer.com

Material that cannot be emailed may be sent to:

**President
Salem State University**

C/O WITT/KIEFFER

Attention: Lucy Leske
2015 Spring Road, Suite 510
Oak Brook, Illinois 60523

Confidential inquiries and questions concerning this search may be directed to 630.575.6122.

SALEM STATE UNIVERSITY IS AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER.
PERSONS OF COLOR, WOMEN AND PERSONS WITH DISABILITIES ARE STRONGLY URGED TO APPLY.

The material presented in this leadership profile should be relied on for informational purposes only. This material has been copied, compiled, or quoted in part from Salem State University documents and personal interviews and is believed to be reliable. While every effort has been made to ensure the accuracy of this information, the original source documents and factual situations govern.

All images and logos used in this leadership profile were provided by Salem State University.

WITT / KIEFFER
Leaders Connecting Leaders

Prepared by

Lucy A. Leske
Ann Yates
Alexis von Kunes Newton
February 2017

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352 Lafayette Street
Salem, MA 01970





Inauguration Address

John D. Keenan, JD

January 19, 2018

Governor Baker and members of his esteemed cabinet; Speaker Robert DeLeo and former colleagues of the Great and General Court; Senator Joan Lovely and Representative Paul Tucker; Mayor Kimberley Driscoll and elected officials of Salem; Commissioner Carlos Santiago; my fellow state university presidents; and to the representatives from other academic institutions - thank you for being here today.

Thank you Chair Mattera and the Salem State Board of Trustees for supporting my appointment to the presidency. Thank you to the inauguration committee for undertaking the planning of today's event. Thank you to my inspiring predecessor Patricia Maguire Meservey who gave me the opportunity to come to Salem State in 2014. Thank you to the entire campus community, students, faculty and staff, for giving me a reason to come to work every day. And to the greater community gathered here, thank you for joining us and welcome to Salem State University.

Thank you all for sharing this special moment for our institution and for my family. Without question, this will rank as one of the top moments in my life – right up there with my wedding day, the days my children were born and my first time being sworn in as state representative.

I stand before you in awe of the incredible responsibility and opportunity I have been offered. Though many have walked this campus, few have had the honor of leading it.

And as I think about the honor it is to shepherd this university into the next decade and perhaps beyond, I think about what made it possible for me to get to this point. The answer, undoubtedly, is education. My education – and the confidence to obtain it – have made all the difference in my life. I firmly believe the famous words of Horace Mann – education is the great equalizer.

It's easy for this to get lost in the day-to-day routine on campus, but we must remember that through our work at Salem State, we are fighting for equality. We are promoting democracy. We are advancing social justice. We know that when it comes to education, access alone is often not enough. True success requires a community that believes in you.

I have been blessed to have mentors, teachers, coaches, friends, classmates, roommates, colleagues, and family who have shaped me into the man standing before you today as the 14th president of Salem State University. The cliché goes: it takes a village to raise a child. My village has been this great community of Salem.

Our students find that village here at Salem State. We are the community that guides them. The support that propels them. And the voice that tells them they can. To those of you who work every day to be that community, thank you.

The only greater honor than being on this stage is working with you to be part of the solution. At Salem State, we not only advance equality by providing an excellent education, but we teach the values that lead to progress. We teach students to think critically and to question the status quo. We foster an environment that encourages activism.

Indeed, it is a unique time to be in America as a student and a university president. Our country is experiencing a time of change, disruption, and division that has not been seen for decades.

In protests and demonstrations that harken back to the sixties, students are challenging campus administrators every day –taking a stand, voicing their opinions, speaking out against racism and sexual assault and for free speech and inclusion.

Divisiveness threatens to, and sometimes succeeds in, tearing apart campuses. We think back to the anti-Semitic chants shouted at Charlottesville, the punches thrown at Middlebury, and to the vandalism that occurred on our very own campus last semester and this week. Although these heinous crimes succeed in putting the worst of society on display, they also open a discussion to begin to heal and tackle racism on campuses across this nation.

While the conversation at Salem State will never be over, I can say we are making progress. We will have this conversation and take action for as long as we must to ensure every student and member of the faculty and staff feels safe and welcome on our campus. We need to ensure that every student at our university, regardless of race, sexual orientation, gender, abilities, beliefs, and socioeconomic status feels at home at Salem State.

We often and rightly boast about being the most diverse of the state universities. It is important to be proud of this distinction and strive towards remaining so, however, we must be as inclusive as we are diverse.

Our students and faculty come from different backgrounds and have a variety of opinions. We want our campus to continue to debate the difficult issues of the day, to vote in local and national elections, and to tell their stories.

Being in Salem, we have a wonderful opportunity to be connected to our community and our history. Our students are extremely fortunate to be studying in a city that is welcoming to all creeds of people. Salem, however, also gave us one of the most significant periods of darkness in our nation's history.

As a descendent of Rebecca Nurse, one of the women convicted and hanged for witchcraft in 1692, and being trained as a lawyer, I am sensitive to the need to provide adequate due process and to fight for social justice. I have dedicated my life to public service in many instances fighting for social justice – whether for marriage equality, transgender rights, or in-state tuition for “dreamers”.

I think of people like Rebecca Nurse and find it is my duty to be the voice of those who cannot speak out for themselves and to advocate for those who need someone in their corner. I brought this commitment with me to Salem State where I promise to do the same for our students.

As I begin my presidency, I wish to share with all of you gathered here today and with the entire campus the vision I have for this institution.

It consists of three primary components – academic excellence, student success, and capital improvements.

The success of our academic programs relies on our faculty to continue to provide exceptional education to our undergraduate and graduate students.

The Bertolon School of Business has been working diligently on achieving accreditation. We are hopeful that we will prevail during this rigorous process to be amongst only five percent of the world's business schools to be accredited by AACSB.

And in occupational therapy, it was recently mandated that the entry level degree for an occupational therapist will be a doctorate by 2027, we will pursue a clinical doctorate in occupational therapy to ensure the continuation of our program. This will be the first time a Massachusetts State University has applied for a doctoral program.

Salem State has long had a commitment to the sciences. With the top workforce needs of the North Shore in the biotech and healthcare fields, we will remain a leader in preparing students for careers in these important industries.

Beginning as a Normal School, Salem State has always had a foundation in the education of America's teachers. We will stay true to these values and continue to build important partnerships with our local community, preparing teachers and academic administrators.

Over the next decade, we will strive to build upon the student success gained during Dr. Meserve's tenure: we will increase the six-year graduation rate from 52 to 65 percent while also eliminating all achievement gaps. We will grow enrollment by some 2000 students either on campus or virtually.

As we look at the landscape of the North Shore, we recognize that the Hispanic population is the fastest growing. By the shift in demographics, Salem State will likely soon become a Hispanic Serving Institution, with 25 percent of our students identifying as Hispanic. While Salem State would be proud to become the first state university to receive this designation, we must have the resources in place to ensure the success of all incoming students.

As we have already seen our efforts come to fruition, with the Education Trust recently placing us on the list of top 10 schools nationwide for Latino student success, we know it is our duty to increase our efforts.

We are committed to ensuring the success of our Latino students as well as our entire student body.

And over the next decade, I hope to give the opportunity of a college education to the students who live in our own backyard who come from challenging economic backgrounds. The children of Rainbow Terrace and Salem who grow up next door to Salem State deserve the opportunity to thrive at our institution.

Today, I announce the formation of the Dream Scholarship which will provide funding to children of Salem who lack the means to have access to a college education. Donations for this inauguration will begin that fund.

At the heart of our institution is a commitment to fighting for social justice, addressing public issues, and connecting to the greater community. It is our commitment to civic engagement.

As we become a regional leader in civic engagement, we will strive towards Carnegie Classification, a national recognition of our commitment and strong bond between campus and community.

To fulfill the dreams of our students and realize many of the goals I set forth today, we will undertake a comprehensive campaign to rival our recently completed 10,000 Reasons Campaign which raised over 26 million dollars. As state universities must become more self-reliant, I hope to increase our efforts and at least double that total in our next campaign.

We must not only grow our student body and increase student success; we must build the facilities needed to achieve the same in the 21st century.

Many of our past presidents have focused on the physical development of our campus, with some of the most significant changes taking place under the leadership of Presidents Keegan, Meier, Harrington and, most recently, Meservey. They gave us some of our most recognized facilities. We will build on that momentum and legacy.

Because of this growth, Salem State has long been identified as three campuses. It is time to bring us together. During my tenure, I hope to create a centralized, consolidated, single campus. No longer will we be identified or represented by North, South and Central, we will become one Salem State campus.

Without question, our top capital priority is the Science Teaching Laboratory Addition which will meet the work force needs of the region. It is imperative that this facility match the excellence of our faculty and academic programs and enables our planned enrollment growth.

As we work to grow our enrollment by 2,000 students over the next decade, there will be a need for additional housing. We will likely need to build two new residence halls to house the influx of students coming to campus as well as meeting our current demand.

Finally, I will continue our advocacy for a commuter rail station within steps of campus. This will not only continue our mission of environmental sustainability, it will increase access from areas throughout the North Shore and beyond. I very much appreciate Mayor Driscoll's efforts on this front.

Now that I have shared some of my major goals, please allow me a minute, to take a breath, and appreciate this incredible moment.

I stand before you today on January 19, 2018 and cannot believe I take the stage to be sworn in as Salem State's 14th president, an honor held by only 13 others in this school's 164-year history. Moreover, with our early leaders forgoing the inauguration ceremony, the number of presidential inaugurations is even fewer with only eight such ceremonies in our history.

This is quite a feeling – almost surreal. I am humbled, honored, thrilled, but above all, ready.

This is unquestionably the capstone of my career in public service. While I've served as prosecutor, solicitor, and legislator, I would not want to spend the remainder of my career doing anything else but helping our students be successful at Salem State and beyond.

Like a third of our Salem State students, I am a first-generation college student. My mother dropped out of high school to marry my father and raise a family. My father worked at a local leather factory, Flynn Tan, like his father before him. I am a proud product of Salem Public Schools - some of my teachers and coaches join us here today. My parents encouraged my siblings and me to go to college to better ourselves and instilled in us a confidence that we could succeed.

I worked hard in high school and with the relentless advocacy by local dentist Don Sadowski, somehow got into Harvard. I took some time after college working before choosing to attend Suffolk Law with encouragement from my mentor and legal titan of Salem, Judge Sam Zoll.

Though I earned a terminal degree, I did not follow a traditional academic route to the presidency and, for many during my confirmation process, this was a concern. The criticism I faced during my selection process did not dishearten me; it inspired me.

The faculty, staff, and students that spoke out against my selection proved that at Salem State, we are passionate about the education we provide to our students and rightfully hold our leaders to the highest standards.

In many ways, I believe my selection as the 14th president was an acknowledgement of a disruption and shift in higher education leadership in the 21st century. Every university board is looking for a president that brings a unique skill-set to compete in an ever-shifting landscape.

There is a quote from one of our most noted alumna, Charlotte Forten, our first African American graduate, that speaks to why I wanted to become president. It says, “I came not here for friendly sympathy or for anything else but to work and to work hard. Let me do that faithfully and well.”

My children will tell you we have only two rules in our house: “try your hardest” and “be polite”. During my time as president, I will do nothing but that. I will work hard every day to make this university the best it can be.

I also implore my children and our students to get up when they are knocked down. Resilience is critical for success in life.

This applied to me quite literally when I was in high school. As a freshman wrestler, I lost my first match in 19 seconds. I got back up and fought my way through to my senior year when I finished the season undefeated in dual meets. And similarly, while seeking elective office, I lost twice before finally winning.

Life is not easy. It’s about choices, perseverance, and hard work. To my children and our students, I say “do not let criticism or failure hold you from your goals.”

I never would have attained this goal if not for many supporters along the way. Calling this city home for over half a century – I am an extremely proud and grateful son of Salem.

To my mentors, coaches, teachers, college roommates, and law school classmates... this whole community really, I say thank you. I couldn’t have made it here without your challenging me to be my very best.

To my father, who taught me the value of hard work. To my mother who died in 1994, who taught me about commitment. To my older brother and sister, I couldn’t have chosen two more supportive siblings and lifelong friends. To my children who are growing up way too fast, you awe me every day with your zest for life and individuality. And to my wife Kara who married me even though I brought nothing to the marriage but my \$54,000 in law school debt, and who has been a supportive partner in everything I set out to do, know you taught me the importance of balance in life.

I stand before you a proud husband, father, son, brother, and friend – and today, officially the 14th President of Salem State University.

I'll end here with a look to the future. As I mentioned earlier, 2018 is a unique, tumultuous time. As we begin the year and I begin the presidency, I reflect on the world our students are experiencing and the world they can shape.

Survival of our democracy requires respect for civic engagement and disagreement. Indeed, the essence of our academic mission – seeking truth through rigorous research – is fueled by disagreement and question.

Seeking truth has been one of the pillars of my career. As a former prosecutor, I always found that there was no better satisfaction than the cross examination of a witness. Seeking the truth fueled my zeal for the work.

Students, I urge you to find something that propels you through life as public service has for me. Find your passion and purpose.

For our faculty, their academic freedom fuels their work. They conduct research and facilitate conversations that allow them to seek similar truths and share those truths with our students and with the world. I am convinced society needs education today more than ever so future generations can debate robustly and civilly the important issues of the day.

One of the greatest leaders of our time, Nelson Mandela, said “Education is the most powerful weapon you can use to change the world”.

As a university, we have the tremendous opportunity to inspire change by educating our students who will go on to shape and mold the world in ways we cannot imagine. I know we have the will, the talent – and the persistence to succeed in the work ahead.

We are up for the task.

Let us begin.



Rankin & Associates, Consulting

Assessment • Planning • Interventions

Salem State
University

Assessment of
Campus Climate
Executive Summary

October 24, 2017



Rankin & Associates, Consulting

Executive Summary

Introduction: History of the Project

Salem State University affirms that diversity and inclusion are crucial to the intellectual vitality of the campus community and they engender academic engagement where teaching, working, learning, and living take place in pluralistic communities of mutual respect. Free exchange of different ideas and viewpoints in supportive environments encourage students, faculty, and staff to develop the critical thinking and citizenship skills that will benefit them throughout their lives.

Salem State University is committed to fostering a caring community that provides leadership for constructive participation in a diverse, multicultural world. As noted in Salem State's mission statement, "Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society...."¹ To better understand the campus climate, the senior administration at Salem State recognized the need for a comprehensive tool that would provide campus climate metrics for the experiences and perceptions of its students, faculty, and staff. During the spring 2017 semester, Salem State conducted a comprehensive survey of all students, faculty, and staff to develop a better understanding of the learning, living, and working environment on campus.

In February 2016, members of Salem State University formed the Climate Study Working Group (CSWG). The CSWG was composed of faculty, staff, students, and administrators. Ultimately, Salem State contracted with Rankin & Associates Consulting (R&A) to conduct a campus-wide study entitled, "Salem State University Assessment of Climate for Learning, Working, and Living." Data gathered via reviews of relevant Salem State literature, campus focus groups, and a campus-wide survey addressing the experiences and perceptions of various constituent groups will be presented at community forums, which will develop and complete two or three action items by fall 2017.

¹<https://www.salemstate.edu/salem-state-difference/mission-vision-and-strategic-plan>

Project Design and Campus Involvement

The conceptual model used as the foundation for Salem State's assessment of campus climate was developed by Smith et al. (1997) and modified by Rankin (2003). A power and privilege perspective informs the model, one grounded in critical theory, which establishes that power differentials, both earned and unearned, are central to all human interactions (Brookfield, 2005). Unearned power and privilege are associated with membership in dominant social groups (Johnson, 2005) and influence systems of differentiation that reproduce unequal outcomes. Salem State's assessment was the result of a comprehensive process to identify the strengths and challenges of campus climate, with a specific focus on the distribution of power and privilege among differing social groups. This report provides an overview of the results of the campus-wide survey.

The Climate Study Working Group (CSWG) collaborated with R&A to develop the survey instrument. Together, they implemented participatory and community-based processes to review tested survey questions from the R&A question bank and develop a survey instrument for Salem State University that would reveal the various dimensions of power and privilege that shape the campus experience. In the first phase, R&A planned 17² focus groups, which were composed of 103 participants (39 students; 64 faculty and staff). In the second phase, the CSWG and R&A used data from the focus groups to co-construct questions for the campus-wide survey. The final Salem State survey queried various campus constituent groups about their experiences and perceptions regarding the academic environment for students, the workplace environment for faculty and staff, employee benefits, sexual harassment and sexual violence, racial and ethnic identity, gender identity and gender expression, sexual identity, accessibility and disability services, and other topics.

In total, 3,086 people completed the survey. In the end, the University's assessment was the result of a comprehensive process to identify the strengths and challenges of campus climate,

²²Although 17 groups were planned, 16 were conducted. Owing to a miscommunication regarding the time of the Veteran Students group, it was not held. Attempts to reschedule the group on the same day were not successful. An email with focus group questions was sent to Veteran student participants by the R&A lead facilitator with no response. Communications between R&A and the CSWG led to the planning of two additional focus groups to be conducted during the week of November 7th via telephone. These groups targeted Veteran Students and International Students.

with a specific focus on the distribution of power and privilege among differing social groups at Salem State.

Salem State University Participants

Salem State University community members completed 3,086 surveys for an overall response rate of 31%. Only surveys that were at least 50% completed were included in the final data set for analyses.³ Sixty-two percent ($n = 1,920$) were Undergraduate Students, 11% ($n = 325$) were Graduate Students, 7% ($n = 201$) were Staff, 8% ($n = 247$) were Administrators, and 13% ($n = 393$) were Faculty. Table 1 provides a summary of selected demographic characteristics of survey respondents. The percentages offered in Table 1 are based on the numbers of respondents in the sample (n) for each demographic characteristic.⁴

³Seventy-three surveys were removed because they did not complete at least 50% of the survey, and 32 duplicate submissions were removed. Surveys were also removed from the data file if the respondent did not provide consent ($n = 176$). Any additional responses were removed because they were judged to have been problematic (i.e., the respondent did not complete the survey in good faith).

⁴The total n for each demographic characteristic may differ as a result of missing data.

Table 1. Salem State University Sample Demographics

		Undergraduate Student		Graduate/Prof Student		Faculty		Administrator		Staff		Total	
		n	%	n	%	n	%	n	%	n	%	n	%
Gender identity ⁵	Woman	1,371	71.41	247	76.00	242	61.58	151	61.13	112	55.72	2,123	68.79
	Man	489	25.47	74	22.77	139	35.37	87	35.22	77	38.31	866	28.06
	Transpectrum/ Multiple/Other	52	2.71	<5	---	5	1.27	<5	---	0	0.00	63	2.04
	Missing	8	0.42	<5	---	7	1.78	6	2.43	12	5.97	34	1.10
Racial identity	Asian/Asian American	67	3.49	15	4.62	16	4.07	5	2.02	<5	---	105	3.40
	Latin@/Chican@/ Hispanic	242	12.60	21	6.46	16	4.07	5	2.02	23	11.44	307	9.95
	Black/African American	197	10.26	20	6.15	18	4.58	13	5.26	9	4.48	257	8.33
	White	1,197	62.34	247	76.00	296	75.32	198	80.16	129	64.18	2,067	66.98
	Multiracial	167	8.70	13	4.00	16	4.07	12	4.86	7	3.48	215	6.97
	Other Person of Color	15	0.78	<5	---	5	1.27	<5	---	<5	---	28	0.91
	Missing/Unknown/ Other	35	1.82	5	1.54	26	6.62	12	4.86	29	14.43	107	3.47
Sexual identity	LGBQ ⁶	358	18.65	50	15.38	51	12.98	31	12.55	11	5.47	501	16.23
	Heterosexual	1,456	75.83	263	80.92	317	80.66	200	80.97	155	77.11	2,391	77.48
	Missing/Other/ Asexual	106	5.52	12	3.69	25	6.36	16	6.48	35	17.41	194	6.29

Note: The total n for each demographic characteristic may differ as a result of missing data.

⁵ Transpectrum is a re-coded variable collapsing the response choices on the survey of Genderqueer, Transgender, and any write-in responses that were outside the gender binary of "man" or "woman".

⁶ LGBQ is a re-coded variable collapsing the response choices on the survey of Bisexual, Gay, Lesbian, Pansexual, Queer, Questioning, and any write-in responses that were not "heterosexual".

Key Findings – Areas of Strength

1. High levels of comfort with the climate at Salem State University

Climate is defined as the “current attitudes, behaviors, and standards of employees and students concerning the access for, inclusion of, and level of respect for individual and group needs, abilities, and potential.”⁷ The level of comfort experienced by faculty, staff, and students is one indicator of campus climate.

- 75% ($n = 2,407$) of the survey respondents were “very comfortable” or “comfortable” with the climate at Salem State University.
- 74% ($n = 619$) of Faculty and Staff/Administrator respondents were “very comfortable” or “comfortable” with the climate in their departments/work units.
- 83% ($n = 2,178$) of Student and Faculty respondents were “very comfortable” or “comfortable” with the climate in their classes.

2. Faculty Respondents – Positive attitudes about faculty work

- 80% ($n = 311$) of Faculty respondents felt valued by their department/program chairs.
- 68% ($n = 261$) of Faculty respondents felt valued by other faculty at Salem State.
- 89% ($n = 338$) of Faculty respondents felt valued by students in the classroom.
- 74% ($n = 284$) of Faculty respondents “strongly agreed” or “agreed” that their teaching was valued.
- Only 20% ($n = 76$) of Faculty respondents “strongly agreed” or “agreed” that faculty in their departments/programs prejudged their abilities based on their perception of their identity/background.
- 13% ($n = 51$) of Faculty respondents thought that their department/program chairs prejudged their abilities.

⁷Rankin & Reason, 2008, p. 264

3. Staff/Administrator Respondents –Positive attitudes about work

- 63% ($n = 281$) of Staff/Administrator respondents “strongly agreed” or “agreed” that they had supervisors who gave them job/career advice or guidance when they needed it.
- 71% ($n = 309$) of Staff/Administrator respondents believed that their supervisors provided adequate support for them to manage work-life balance.
- 26% ($n = 112$) of Staff/Administrator respondents “strongly agreed” or “agreed” that they were burdened by work responsibilities beyond those of their colleagues with similar performance expectations.
- 69% ($n = 299$) of Staff/Administrator respondents believed that they were given a reasonable time frame to complete assigned responsibilities.
- 63% ($n = 278$) of Staff/Administrator respondents would recommend Salem State as a good place to work.
- 64% ($n = 281$) of Staff/Administrator respondents “strongly agreed” or “agreed” that they had job security.

4. Student Respondents – Positive attitudes about academic experiences

The way students perceive and experience their campus climate influences their performance and success in college.⁸ Research also supports the pedagogical value of a diverse student body and faculty for improving learning outcomes.⁹ Attitudes toward academic pursuits are one indicator of campus climate.

All Student respondents

- 72% ($n = 1,612$) of Student respondents felt valued by Salem State faculty.
- 68% ($n = 1,520$) of Student respondents felt valued by Salem State staff.
- 50% ($n = 1,121$) of Student respondents felt valued by Salem State senior administrators.
- 69% ($n = 1,549$) of Student respondents believed that the campus climate encourages free and open discussion of difficult topics.

⁸Pascarella & Terenzini, 2005

⁹Hale, 2004; Harper & Hurtado, 2007; Harper & Quaye, 2004

- 71% ($n = 1,589$) of Student respondents indicated that they have faculty whom they perceive as role models.

Graduate and Professional Student respondents

- 68% ($n = 219$) of Graduate Student respondents “strongly agreed” or “agreed” that they were satisfied with the quality of advising they had received from their departments.
- 74% ($n = 240$) of Graduate Student respondents felt they had adequate access to their advisors.
- 71% ($n = 229$) of Graduate Student respondents believed that their advisors provided clear expectations.
- 81% ($n = 263$) of Graduate Student respondents felt comfortable sharing their professional goals with their advisors.

Student Respondents *Perceived Academic Success*

A confirmatory factor analysis was conducted on the scale, *Perceived Academic Success*, derived from Question 11 on the survey. Analyses using this scale revealed:

- A significant difference existed in the overall test for means for Students by sexual identity and disability status for Undergraduate Student respondents on *Perceived Academic Success*. No significant differences existed for Graduate Student respondents.
- LGBQ Undergraduate Student respondents had a lower *Perceived Academic Success* score than Heterosexual Undergraduate Student respondents.
- The Undergraduate Student respondents who indicated No Disability had a higher *Perceived Academic Success* score than Single Disability Undergraduate Student respondents and Multiple Disabilities Undergraduate Student respondents.

Key Findings – Opportunities for Improvement

1. Members of several constituent groups indicated that they experienced exclusionary, intimidating, offensive, and/or hostile conduct.

Several empirical studies reinforce the importance of the perception of non-discriminatory environments for positive learning and developmental outcomes.¹⁰

Research also underscores the relationship between workplace discrimination and subsequent productivity.¹¹ The survey requested information on experiences of exclusionary, intimidating, offensive, and/or hostile conduct.

- 17% ($n = 528$) of respondents indicated that they personally had experienced exclusionary, intimidating, offensive, and/or hostile conduct.¹²
 - 22% ($n = 118$) noted that the conduct was based on their gender/gender identity, 19% ($n = 101$) felt that it was based on their position status, and 19% ($n = 95$) felt that it was based on their ethnicity.
- Differences emerged based on gender/gender identity, position status, and racial identity:
 - By gender identity, a higher percentage of Transpectrum respondents (35%, $n = 22$) than Women respondents (17%, $n = 365$) or Men respondents (15%, $n = 131$) indicated that they had experienced exclusionary, intimidating, offensive, and/or hostile conduct.
 - 41% ($n = 9$) of Transpectrum respondents, compared with Women respondents 18% ($n = 66$) and 15% ($n = 20$) of Men respondents who noted they had experienced exclusionary, intimidating, offensive, and/or hostile conduct indicated the conduct was based on their gender identity.
 - By position status, 25% ($n = 97$) of Faculty respondents, 23% ($n = 46$) of Staff respondents, 22% ($n = 54$) of Administrator respondents, 11% ($n =$

¹⁰Aguirre & Messineo, 1997; Flowers & Pascarella, 1999; Pascarella & Terenzini, 2005; Whitt, Edison, Pascarella, Terenzini, & Nora, 2001

¹¹Silverschanz, Cortina, Konik, & Magley, 2008; Waldo, 1999

¹²The literature on microaggressions is clear that this type of conduct has a negative influence on people who experience the conduct, even if they feel at the time that it had no impact (Sue, 2010; Yosso, Smith, Ceja, & Solórzano, 2009).

37) of Graduate Student respondents, and 15% ($n = 294$) of Undergraduate Student respondents believed that they had experienced exclusionary conduct.

Of those respondents who noted they had experienced exclusionary conduct, a higher percentage of Staff respondents (52%, $n = 24$) and Administrator respondents (44%, $n = 24$) thought that the conduct was based on their position status, compared with Faculty respondents (19%, $n = 18$), Undergraduate Student respondents (11%, $n = 33$), and Graduate Student respondents ($n < 5$).

- o By racial identity, significant differences emerged with White respondents (16%, $n = 320$) indicating that they had experienced exclusionary, intimidating, offensive, and/or hostile conduct within the past year less than Multiracial Respondents (21%, $n = 46$) and Respondents of Color (19%, $n = 135$).

Of those respondents who reported experiencing this conduct, higher percentages of Multiracial Respondents (28%, $n = 13$) and Respondents of Color (43%, $n = 58$) than White respondents (7%, $n = 21$) believed the conduct was based on their race.

Respondents were offered the opportunity to elaborate on their experiences of exclusionary, intimidating, offensive, and/or hostile conduct at Salem State University. Fifty-four students, faculty, and staff contributed comments regarding their personal experiences. Twenty-five respondents elaborated on the types of disrespectful conduct that they reported. Forty-eight respondents described a lack of follow-through after reporting.

2. Several constituent groups indicated that they were less comfortable with the overall campus climate, workplace climate, and classroom climate.

Prior research on campus climate has focused on the experiences of faculty, staff, and students associated with historically underserved social/community/affinity groups (e.g.,

women, People of Color, people with disabilities, first-generation students, veterans).¹³

Several groups at Salem State indicated that they were less comfortable than their majority counterparts with the climates of the campus, workplace, and classroom.

- By racial identity: a significantly smaller proportion of Respondents of Color (47%, $n = 327$) were “comfortable” with the overall climate at Salem State than were White respondents (53%, $n = 1,102$). A higher percentage of White Faculty and Student respondents (30%, $n = 522$) were “very comfortable” with the climate in their classes than were Faculty and Student Respondents of Color (23%, $n = 145$).
- By sexual identity: a smaller percentage of LGBTQ respondents (22%, $n = 99$) felt “very comfortable” with the overall climate than Heterosexual respondents (30%, $n = 603$).
- By disability status: a higher percentage of No Disability respondents (25%, $n = 633$) than Respondents with a Single Disability (19%, $n = 62$) were “very comfortable” with the overall climate. A higher percentage of respondents with No Disability (30%, $n = 635$) than respondents with a Single Disability (21%, $n = 62$) and respondents with Multiple Disabilities (21%, $n = 37$) were “very comfortable” with the classroom climate.

3. Faculty and Staff/Administrator Respondents – Challenges with work-life issues

- 46% ($n = 182$) of Faculty respondents, 42% ($n = 82$) of Staff respondents, and 56% ($n = 137$) of Administrator respondents had seriously considered leaving Salem State in the past year.
 - 47% ($n = 187$) of those Faculty, Staff, and Administrator respondents who seriously considered leaving did so because of limited opportunities for advancement.
 - 45% ($n = 179$) of Faculty, Staff, and Administrator respondents each indicated that they did so because of lack of instructional support and/or low salary/pay rate.

¹³Harper & Hurtado, 2007; Hart & Fellabaum, 2008; Norris, 1992; Rankin, 2003; Rankin & Reason, 2005; Worthington, Navarro, Loewy, & Hart, 2008

- By faculty status: 54% ($n = 122$) of Tenure/Tenure-Track Faculty respondents and 36% ($n = 55$) of Adjunct Faculty respondents seriously considered leaving Salem State.
- By staff status: 50% ($n = 63$) of AFSCME Staff respondents and 27% ($n = 19$) of NUC/Chartwells/Contract Staff respondents seriously considered leaving Salem State.
- By citizenship status: 49% ($n = 349$) of U.S. Citizen Employee respondents and 38% ($n = 41$) of Not-U.S. Citizen Employee respondents seriously considered leaving Salem State.
- By religious/spiritual identity: Employee respondents with No Religious/Spiritual Identity (54%, $n = 145$) and Christian Employee respondents (41%, $n = 157$) seriously considered leaving Salem State. Employee respondents with Multiple Religious/Spiritual Identities (55%, $n = 24$) and Employee respondents with Additional Religious/Spiritual Identities (46%, $n = 38$) were not statistically different from the other two groups.

4. Faculty Respondents – Challenges with faculty work

- 21% ($n = 81$) of Faculty respondents thought that salaries for tenure-track faculty positions were competitive and 19% ($n = 70$) thought that salaries for adjunct/full-time temporary professors were competitive.
- 8% ($n = 31$) of Faculty respondents “strongly agreed” or “agreed” that child care benefits were competitive.
- 32% ($n = 72$) of Tenured and Tenure-Track Faculty respondents thought that tenure standards/promotion standards were applied equally to faculty in their schools/division and 14% ($n = 31$) of Tenured and Tenure-Track Faculty respondents believed that Salem State faculty who would benefit from delaying their tenure-clock felt empowered to do so.
- 19% ($n = 42$) of Tenured and Tenure-Track Faculty respondents believed that faculty opinions were taken seriously by senior administrators.

- 25% ($n = 43$) of Non-Tenure-Track Faculty respondents “strongly agreed” or “agreed” that the criteria used for contract renewal was applied equally to all positions.
- 28% ($n = 44$) of Non-Tenure-Track Faculty respondents felt that their academic advising was valued.
- 32% ($n = 52$) of Non-Tenure-Track Faculty respondents felt that their opinions were taken seriously by senior administrators (e.g., chair, dean, provost).
- 15% ($n = 24$) of Non-Tenure-Track Faculty respondents “strongly agreed” or “agreed” that they have job security.

Ninety-Six Staff/Administrator respondents contributed comments regarding their employment-related experiences. Three themes emerged from these comments: 1) lack of advancement opportunities and professional development, 2) salary imbalances and workload, and 3) short-comings of leadership,

When asked to elaborate on their responses, Tenured and Tenure-Track Faculty respondents noted inconsistent expectations in service and inclusion concerns based on race and sexuality. Non-Tenure-Track Faculty respondents described concerns with job security and a low sense of belonging. Faculty respondents, in general, described challenges with funding for research and professional development, as well as, dissatisfaction with their salaries.

5. A small, but meaningful, percentage of respondents experienced unwanted sexual conduct.

In 2014, *Not Alone: The First Report of the White House Task Force to Protect Students from Sexual Assault* indicated that sexual assault is a substantial issue for colleges and universities nationwide, affecting the physical health, mental health, and academic success of students. One section of the Salem State survey requested information regarding sexual assault.

- Two hundred and forty (8%) respondents indicated that they had experienced unwanted sexual conduct while at Salem State.

- 1% ($n = 39$) of respondents experienced relationship violence (e.g., ridiculed, controlling, hitting) while a member of the Salem State community.
- 2% ($n = 71$) of respondents experienced stalking (e.g., physical following, on social media, texting, phone calls) while a member of the Salem State community.
- 5% ($n = 142$) of respondents experienced unwanted sexual interaction (e.g., cat-calling, repeated sexual advances, sexual harassment) while a member of the Salem State community.
- 2% ($n = 53$) of respondents experienced unwanted sexual contact (e.g., fondling, rape, sexual assault, penetration without consent) while a member of the Salem State community.
- Over half of the Undergraduate Student respondents who had indicated they had experienced unwanted sexual conduct of any type reported that it occurred during their first year and often during the first semester.
- Higher percentages of Non-Transfer Student respondents, Women and Transspectrum respondents, LGBQ respondents, U.S. Citizen respondents, Respondents with Multiple Disabilities, Respondents with a Single Disability, and Campus Housing Student respondents reported experiencing unwanted sexual conduct of any type than their colleagues.
- Eighty to ninety percent of respondents who experienced unwanted sexual conduct did not report it.

Respondents were offered the opportunity to elaborate on why they did not report unwanted sexual experiences. Five themes emerged: 1) fear of blame, 2) belief nothing would be done, 3) conduct was insignificant, 4) conduct was significant, but commonplace, and 5) lack of support.

Conclusion

Salem State University climate findings¹⁴ were consistent with those found in other higher education institutions across the country based on the work of R&A Consulting.¹⁵ For example, 70% to 80% of respondents in similar reports found the campus climate to be “comfortable” or “very comfortable.” A similar percentage (75%) of Salem State respondents reported that they were “very comfortable” or “comfortable” with the climate at Salem State. Likewise, 20% to 25% of respondents in similar reports indicated they personally had experienced exclusionary, intimidating, offensive, and/or hostile conduct. At Salem State, a lower percentage of respondents (17%) indicated that they personally had experienced exclusionary, intimidating, offensive, and/or hostile conduct. The results also paralleled the findings of other climate studies of specific constituent groups offered in the literature.¹⁶

Salem State’s climate assessment report provides baseline data on diversity and inclusion and addresses Salem State’s mission and goals. While the findings may guide decision-making in regard to policies and practices at Salem State, it is important to note that the cultural fabric of any institution and unique aspects of each campus’s environment must be taken into consideration when deliberating on additional action items based on these findings. The climate assessment findings provide the Salem State community with an opportunity to build upon its strengths and to develop a deeper awareness of the challenges ahead. Salem State, with support from senior administrators and collaborative leadership, is in a prime position to actualize its commitment to promote an inclusive campus and to institute organizational structures that respond to the needs of its dynamic campus community.

¹⁴Additional findings disaggregated by position status and other selected demographic characteristics are provided in the full report.

¹⁵Rankin & Associates Consulting, 2015

¹⁶Guiffrida, Gouveia, Wall, & Seward, 2008; Harper & Hurtado, 2007; Harper & Quayle, 2004; Hurtado & Ponjuan, 2005; Rankin & Reason, 2005; Sears, 2002; Settle, Cortina, Malley, & Stewart, 2006; Silverschanz et al., 2008; Yosso et al., 2009

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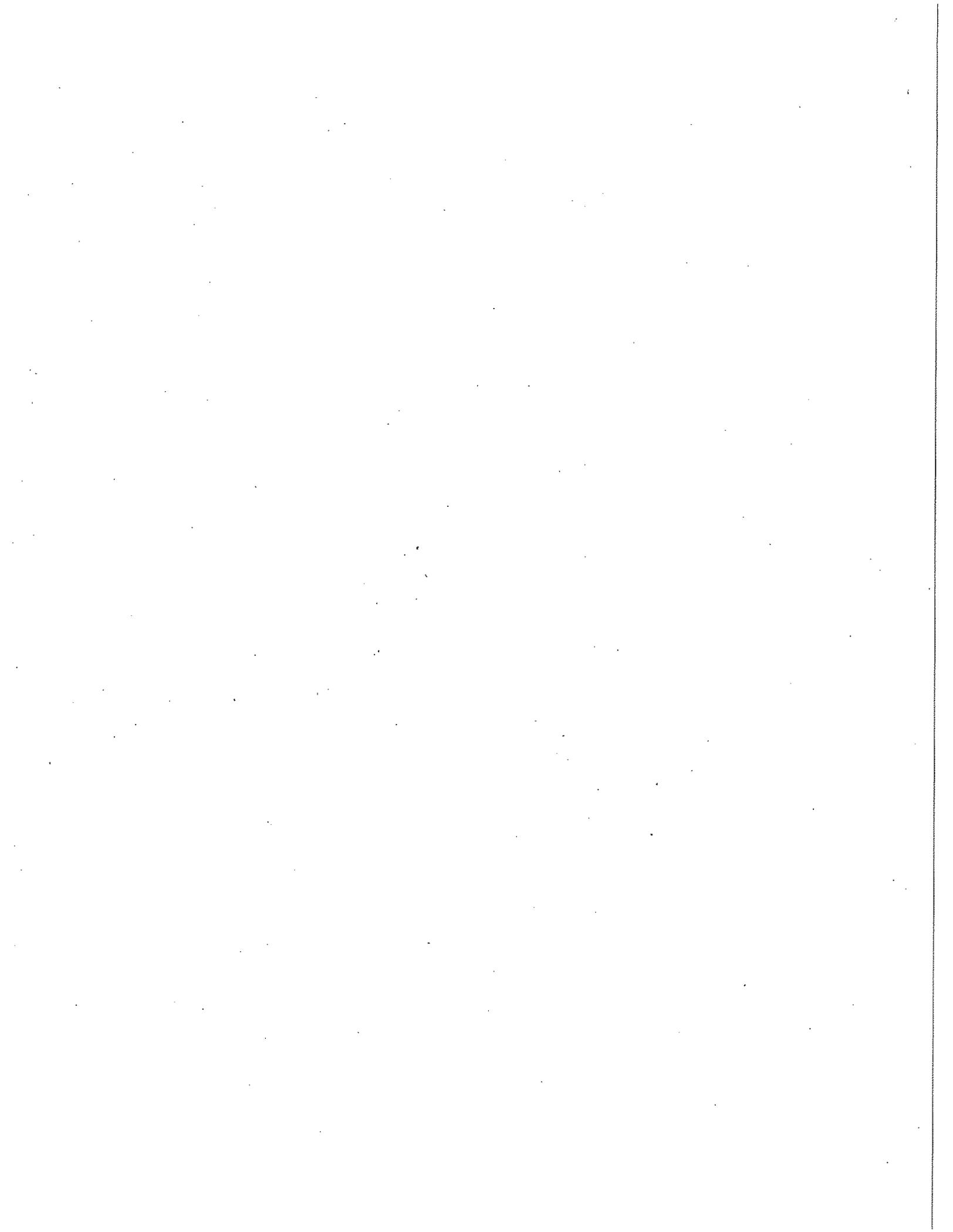
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STRATEGIC PLAN

NOVEMBER 9, 2017

EXECUTIVE SUMMARY

This Salem State University strategic plan concludes a transparent and inclusive campus-wide planning process led by the institution's Collaboration Committee. Through this strategic plan, we affirm the university's mission and vision, and present expanded core values. The university takes pride in our gains towards the Massachusetts Board of Higher Education (BHE) system goals of college participation, college completion, and closing achievement gaps. Of equal importance in accomplishing these goals has been a commitment to authentic teamwork, an openness to sincere dialogue, and the discernment and engagement required to undertake systemic change.

The strategic plan presented in this document builds on these important gains, learns from both successes and failures, is tempered by internal and external realities, and confidently presents bold yet feasible strategic priorities that align with our institution's strengths and the North Shore's and the Commonwealth's educational, economic and workforce needs.

Salem State's four strategic goals are:

Financial Vitality: Strengthen Salem State's financial foundation, align resources with priorities, and foster innovation to drive new revenue streams. Identify and implement additional opportunities to contain, reduce, or avoid future growth in costs. We must continue to work towards establishing a stronger financial base, by strategically growing enrollment, diversifying program delivery, and generating new sources of revenue. Current Business Intelligence efforts will provide the roadmap.

Collaboration, Inclusion and Stewardship: Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship. The pace of change in higher education requires a coordinated, committed and collaborative process of relationship- and trust-building among faculty, staff, students and external partners. The Campus Climate Study¹ results will help guide us.

Academic Excellence: Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society. Our continued successes in academic excellence require support for faculty development in aid of pedagogical and

curricular innovation (including alternative modes of course delivery), as well as greater connection to regional opportunities for experiential learning, continuing scholarship, and civic engagement.

Student Success: Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals. We aim to foster a supportive environment for student growth in the context of the North Shore's shifting demographics and evolving economic trends, with an eye toward providing more nimble responses to the needs of our students and their future employers.

Implementing these four goals will lead to success in these areas:

BHE "Big Three": Salem State University will continue to boost college participation by strategically increasing enrollment, via expanded partnerships and articulations with PK-12 districts and community colleges and strategic growth in regional high-demand academic programs. Similarly, college completion rates will continue to increase due to improved academic advising and student success programming. Moreover, the university will build on its success of closing achievement gaps by focusing resources on the programmatic areas with highest impact.

Inclusive Excellence: Focused attention the principles of inclusive excellence, which promotes a more just and equitable society, supports our institutional mission as operationalized both on our campus and in our region. Moreover, success in achieving the BHE Big Three goals critically depends on a campus climate in which diversity (in its many forms) is acknowledged, valued, celebrated, and integrated into the entire college-going experience. The recommendations from the Campus Climate Study will provide a roadmap to being a welcoming, accessible, student-centered, high-quality academic institution.

Science & Healthcare on a Liberal Arts Foundation: Salem State's focus on science and healthcare as firmly grounded in the liberal arts acknowledges the ways in which the university's current strengths and future opportunities are well aligned to the industry strengths and workforce needs of North Shore and Greater Boston regions. Our academic programs in these areas are limited by the condition and flexibility of our physical space. To foster greater student success in these academic domains, the university must continue to extend its regional business partnerships to increase the number of internships and opportunities for student and faculty research.

Place: Salem State is the North Shore's university. Every program, department and public space on campus is regionally engaged through teaching, research, civic engagement, service contracts and cultural events. In pursuit of promoting academic excellence (including the BHE Big Three), Salem State will focus its economic, cultural, social, and workforce engagement in collaboration with regional planning to sharpen impact and wisely leverage local resources.

Civic Responsibility: Salem State seeks to build upon its historic commitment to social justice and civic engagement. The university will continue to be an exemplar for civic leadership statewide, regionally, and nationally with the intention of achieving the Carnegie Community Engagement Classification.ⁱⁱ

PLANNING PROCESS

Salem State University's strategic planning process started in the spring of 2016 with the university's Collaboration Committee accepting the assignment of campus-wide strategic planning as its charge for AY2017. The committee enthusiastically accepted the role to facilitate an inclusive process for collecting the campus community's ideas and recommendations and distilling them into a four-year strategic plan. The committee was led by then Assistant Dean Nate Bryant and Professor Monica Leisey, with Chief of Staff Beth Bower and Executive Director of Strategic Planning and Decision Support Chunju Chen serving *ex-officio*. Linda Campanella, SOS Consulting, was engaged to assist the committee and work started in July 2016 to assure that all aspects of the Salem State community had input. The committee updated to the president, the President's Executive Council (PEC) and the President's Leadership Cabinet. In addition, Board of Trustees Chair Paul Mattera appointed Trustee Kathy Murphy (SSU '75) as liaison to the strategic planning process.

In the fall of 2016 the planning process focused on assessment, reflection, and visioning. The campus community was first invited to reflect on the successes and unaddressed opportunities of the 2013 - 2017 Strategic Plan. Next, internal and external data were examined, including a number of recently administered student surveys, the Salem State Vision Project Dashboard, our Peer & Aspirant Institution comparative data, and our Board of Trustees Scorecard.

The Collaboration Committee then led an intense and inclusive outreach process to ensure key stakeholders would have multiple opportunities to provide input to assure a shared vision and goals. During the fall of 2016, the SSU community participated in well over 2,000 touch points and engagement opportunities. This broad process was used to craft a consensus on strategic strengths and weaknesses. Through this process our mission was confirmed. It also articulated the university's core values, a new vision statement, and a slate of preliminary goals, each of which were presented to the President's Leadership Cabinet, the campus community, and the Board of Trustees in January 2017. In February, task forces were convened and offered further language and strategies for consideration by the Collaboration Committee and the PEC.

The current product reflects this comprehensive input guided by the PEC's effort to prioritize future work and to ensure a comprehensive strategic positioning for the university. The work between the Collaboration Committee and the PEC has "pivoted." Initially, the role of the Committee was to gather, synthesize, and analyze input from the campus community and develop a preliminary set of goals and strategies. The Committee served as a broad-based focus group during the refinement and

prioritization of the plan that ensured that the input of the campus community remained the foundation of and provided direction to the final plan.

OUR MISSION

Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society, and serve as a resource to advance the region's cultural, social, and economic development.

OUR VISION

Salem State University will be a premier teaching university that engages students in an inspiring transformational educational experience.

- We put students first in all that we do and are committed to their success.
- We are a community of learners where all faculty, staff, and students have the opportunity to grow as individuals.
- We are innovators, offering a unique brand of public higher education that inspires students to reach higher and achieve more.
- We remain true to our heritage as a liberal arts university while we prepare students for today's workforce.
- We serve the communities of the North Shore while we create an ever more globally aware and culturally diverse campus environment.

OUR CORE VALUES

At Salem State University, two fundamental commitments unite and motivate us in daily pursuit of our mission:

1. **Academic excellence:** We cultivate an intellectually vibrant community led by a faculty dedicated to excellent teaching and enriched by students eager to learn and meet high standards of excellence.
2. **Student success:** We put students first in all that we do and are committed to fostering success in their studies, careers, and life.

We hold the following core values as a public university whose foundation is the liberal arts tradition:

- **Access:** We have a long history of, and deep commitment to, providing a pathway to college participation and completion for first-generation college students and others who may consider this goal beyond reach.

- **Civic engagement:** We forge mutually enriching relationships with, and contribute to, the cultural and economic vitality of our region, the Commonwealth of Massachusetts, and the global community.
- **Inclusion:** We promote an inclusive campus environment that respects human differences, welcomes and celebrates diversity, promotes global awareness, and inspires students, faculty, and staff to be champions of social justice and the common good.
- **Innovation:** We strive to provide a fertile and adaptive environment where entrepreneurial thinking and pioneering approaches flourish.
- **Scholarship:** We support research and creative endeavors that inform or inspire others, expand knowledge and academic disciplines, and connect us with the wider world.
- **Stewardship:** We encourage responsible use and cultivation of resources—human, physical, environmental, and financial.
- **Well-roundedness:** We promote development of a broad range of intellectual, personal, and practical skills and habits of mind by offering educational programs and applied learning opportunities grounded in the liberal arts tradition and geared toward 21st-century careers.

CONTEXT

ENVISIONING SALEM STATE IN FOURth YEARS: BUILDING A SOLID FOUNDATION

Salem State University **today** is a thriving institution and caring campus community distinguished by:

- academic quality and achievement;
- a student-centered approach to teaching and learning;
- deep roots in the liberal arts tradition;
- a strong, enduring commitment to diversity and social justice dating back to the university's connections with early abolitionists;
- a dedicated faculty, staff, and students who strive to do and be their best; and accomplished alumni who are making a difference in their professions, their communities, and the wider world.

We **reaffirm** Salem State's identity as a teaching institution and our belief that undergraduate education is the cornerstone of our mission. Simultaneously, we embrace and continue to lean into the opportunities and responsibilities associated with Salem State's evolution from college to university. Graduate education and faculty scholarship, which we define broadly and inclusively, are central to the enterprise. We balance the need to be responsive to workforce needs with an unwavering commitment to an educational experience firmly grounded in the liberal arts.

Our commitment to academic freedom, equity and access, affordability, inclusivity, civic engagement, social justice, student-centeredness, and sense of community that gives Salem State a small-college feel is unwavering, and we will continue to uphold and leverage these defining distinctions as we move forward. Equally strong is our bedrock commitment to serving students from traditionally under-represented and under-served backgrounds, educating and mentoring them, and improving their social mobility. We steadfastly believe a university education can, and should, change an individual's options, opportunities, and overall life trajectory.

THE FUTURE

Building on our strengths, **four years from now** Salem State will continue to be a thriving, welcoming, inclusive, adaptive university that graduates well-rounded, comprehensively educated, civically minded, socially conscious individuals ready to tackle whatever challenge comes their way; they will be motivated to engage in addressing societal problems that affect the common good and will be well-prepared to succeed and lead in their careers and communities. Resulting in part from enhanced academic advising and a strategic focus on student transitions, engagement, and wellness, Salem State will make robust gains in retention and completion rates and closing the achievement gap between majority and under-represented student populations.

The university will be even more widely recognized and respected for programmatic centers of excellence in science, healthcare and the “helping professions” (human services) as well as for its leadership in the realm of diversity and inclusion. Undergraduate, continuing education, and graduate studies will be well integrated, and academic programs will respond to evolving needs of students and the workplace they will enter, including workplaces that now consider a professional doctorate to be the capstone degree for entry-level positions. Salem State will be leveraging its location in historic Salem, on the North Shore of Massachusetts, and in proximity to the state's capital in ways that distinguish the university's program, enhance the educational experience of students, and contribute significantly to the region by promoting wellbeing and prosperity, safeguarding local resources, and advancing economic growth. The university's role and contributions in the realm of economic development will be more obvious and more important than ever.

Seeking to be all it can be – but not aspiring to be all things to all people – the university will have engaged in thoughtful institutional discernment about how most effectively to invest and deploy limited resources in order to maximize impact. The campus community through shared governance will make tough choices relating to (i) where to pursue intentional growth based on competitive advantage or community need, and (ii) how to leverage opportunities to go deeper in order to enhance impact rather than go wider in order to expand reach. As a result of new and expanded programs that generate enrollment-driven revenue and diversification of revenue sources (e.g., expanded summer conference operations), Salem State will be more financially stable and thus able

to invest more fully in its mission, in its students, and in realizing its potential as a great public university.

Recruitment best practices, clarity of expectations, and focus on cultural sensitivity will have resulted in improved diversity, productivity, and satisfaction among faculty and staff. Employees will increasingly appreciate working in a highly effective and inclusive environment that promotes shared responsibility and instills a leadership culture on campus at all levels. Promoting student success will be seen as everyone's "job," and an understanding and application of growth mindset not only to close achievement gaps, but also to promote employee growth, will be deeply embedded in the university's culture

STRENGTHS ANALYSIS

From 2013 – 2017 the university's priorities focused on student success, aligning with the Massachusetts Board of Higher Education's (BHE) "Big Three": college participation, closing achievement gaps and college completion, all with particular emphasis on students from underserved populations. Historically the *most diverse* institution among the state universities, SSU is focused on the recruitment, retention and graduation of *all* of our students. Salem State attracts most of its degree-seeking undergraduates from the culturally and economically diverse cities and communities located north and west of Boston. The majority of entering first year students are first-generation (over 60 percent in 2015), with significant numbers who are Pell-eligible (40 percent among FTFT students in 2015), and students of color (35 percent of first year students in 2016). Achievement gaps for students of color, first generation and low-income students nationally underscore the critical importance of addressing barriers to enable more students to succeed, especially students from communities that have been historically underrepresented in higher education.

To boost college participation, the university partners with regional and Boston-area high schools and non-profits, as well as works closely with Bunker Hill Community College, North Shore Community College, Northern Essex Community College and Roxbury Community College on facilitating the critical transition between the two-year and four-year institutions. To increase retention and completion, strategic investment in programmatic initiatives have included creation of a First Year Experience program (including a campus-wide common reading initiative and a spectrum of First Year Seminars); establishment of the Center for Academic Excellence, a one-stop center for academic support services (advising, tutoring, supplemental instruction); transformation of the university's general education curriculum, including an overlay that addresses issues of diversity, power dynamics, and social justice; implementation of the early warning retention system "MAPWorks ("Making Achievement Possible"); and consolidation of offices devoted to "the business of being a student" in a centralized (and nationally- recognized) Student Navigation Center. These efforts have borne fruit: in 2007, Salem State's six-year first-time, full-time completion rate was 37 percent. In 2016, the completion rate had risen 15 percentage points to 52 percent.

The university's recent successes are all the more noteworthy in the face of a challenging demographic context. Despite declining high school graduation rates in the northeast, Salem State's enrollment remains relatively level with 1,145 freshmen in 2016 and increased overall applications and admits. Retention rates are stable at 80 percent. Six-year graduation rates increased to 52 percent, while four-year graduation rates grew to over 39 percent. Arts and Sciences scholarships were offered for select programs with the potential to grow. We have made great strides in traditional measures of student success at the undergraduate level. While our headcount of students has remained level, the diversity of our population continues to expand. In the fall of 2016, 34 percent of our entering class self-identified as students of color. We are closing the achievement gaps between our white students and students of color.

In pursuit of these institutional successes, the university has made a number of strategic investments. For example, the Center for Academic Excellence provides academic support services, including advising, tutoring, mentoring, supplemental instruction, reading and test-taking strategies. The office also collaborates with other departments to ensure that students have the appropriate academic supports to be successful. CAE support services were accessed by nearly 8,000 students last year. These services and the respective numbers of students using them include advising (over 5,000), tutoring (nearly 1,500), and mentoring (nearly 500). In addition, programs supporting low-income and underrepresented populations, such as the Summer Bridge Academy and TRIO Support Services, are also under the CAE umbrella.

In 2016 the president, on the recommendation of the President's Advisory Council on Diversity, Affirmative Action, Equity and Social Justice (PAC-D), created the office of Inclusive Excellence, and hired the university's first vice president of Inclusive Excellence. Academic Affairs, Human Resources and Equal opportunity, and the office of Inclusive Excellence have collaborated on putting in place guidelines and strategies for the recruitment of diverse staff and faculty and a bias incident reporting protocol.

Student life's diversity and multicultural affairs office offers mentoring programs with faculty fellows supporting underrepresented students. The Brotherhood is an academic success and retention program offered to support self-identified men of color, while BEES (Bold, Educated, Empowered Sisters) is a similar program to support empowering women of color. *INSIGHT into Diversity* magazine recently awarded Salem State University with the 2017 Higher Education Excellence in Diversity (HEED) Award, a national honor recognizing U.S. colleges and universities that demonstrate an outstanding commitment to diversity and inclusion.

Salem State also has the largest number of international students among the state universities. A comprehensive campus-wide initiative to support international student success transformed the previously isolated, independent pockets of international activity on the campus into a coordinated effort. This multi-faceted, multi-disciplinary approach is infusing internationalization throughout the university's curriculum, campus climate, study abroad programs, visiting scholars, student

engagement, English as a second language programs, immigrant populations, international students, and community engagement.

The university was the only Massachusetts institution awarded a \$300,000 federal grant (2015) annually for three years from the Department of Justice's Office on Violence Against Women. With these funds a campus office was created and staffed by a professional and a graduate assistant to reduce sexual and relationship violence and stalking on campus, enhance victim services, increase prevention and education, and strengthen campus security.

To support the academic, enrollment management, and student life initiatives, administrative departments also undertook key initiatives. Salem State is committed to capital planning that engages the campus and the broader external community. The university completed a 2040 Master Vision plan^{iv} in 2013 that provided a roadmap for capital improvements to support academic excellence and student success. In the past five years, capital projects focused on promoting student success and improving the student experience with the construction of a new library and learning commons, two residence halls, a fitness center, a student navigation center, and a student parking garage. Our expanding School of Social Work was moved to new quarters and the nationally recognized Salem State Theater Department now has a 21st century theater complex.

Over the past three years the university has improved its financial management and operations to meet the needs of this increasingly complex comprehensive university. Organizational restructuring, improved business processes, and transactional systems have been achieved. The creation of a multi-year, data-driven financial planning and execution process are helping to align our resources with strategic imperatives to promote long-term financial stability. The budget is now prepared on an All Funds basis and an updated set of financial benchmarks is in use to assess the institution's financial situation year over year. Work in progress includes development of sophisticated business intelligence analytical tools to assess academic program net margin contribution via integration of data from the disparate student, HR, and financial systems. In FY17 a first-ever, multi-year financial projection (MYFP) was created. As strategic plan initiatives are developed, they are being quantified and layered into the baseline to provide a holistic financial understanding of the future state of the university.

The recruitment of an executive director of strategic planning and decision support in 2015 has significantly improved the university's collection and understanding of data and data management to support analysis of trends and needs. Her collaboration across divisions is focused on using data to inform decision-making in an intentional and consistent manner. Recent examples include new academic program decisions, focused work in the area of academic assessment, and further development of information technology governance and capital project governance processes.

In addition, the university successfully reviewed and received BHE approval for a number of undergraduate and graduate degree programs. The university has again identified areas of academic

strength that respond to statewide and regional needs and opportunities. This was accomplished through a data-driven process that considered BHE data, enrollment trends, market analysis, demographic data, student success information, and programmatic evaluations.

Salem State University always operates with an eye on efficiency and financial prudence, in addition to effectiveness and quality objectives inherent in our operations and activities. We are mindful of the importance of growing revenues other than tuition and fees. Partnerships with external vendors continue to help diversify and increase our revenues. Commissions and other contributions from auxiliary service provider partners generate significant funding for the university. And, a capital campaign led by institutional advancement successfully raised over \$26.5 million, comfortably exceeding the \$25 million goal. Over 12,000 alumni, friends, faculty, students and staff contributed to the 10,000 Reasons campaign. It is of note that the internal campus portion of the campaign brought in \$3.7M with 94 percent support from faculty and staff.

WEAKNESSES ANALYSIS

Although the 2008 Higher Education bond bill had bond capacity to address the delay in upgrading Salem State's scientific laboratory infrastructure funding was only released for the study. This study confirmed the need for a Science Teaching Laboratory Addition to meet student and industry demand for science and healthcare degrees and credentials. Construction of the proposed Science Teaching Laboratory Addition will serve the ever increasing population of regional students seeking biology, chemistry, healthcare and nursing degrees. Our highest demand program is nursing, and Salem State's other health programs are important workforce growth areas that are experiencing increasing student interest. Biology and chemistry are strong and positioned for expansion. However, the university is lacking the laboratory facilities that meet current industry standards and accommodate this growth. Without increases in enrollment (count), the need to cover labor and facility-related expense growth with revenue growth places pressure on prices (rates) that is counter to our imperative to provide reasonable cost offerings to our students in fulfillment of our mission.

As one of the state universities with the highest concentrations of students who are Pell-eligible, student need routinely exceeds available resources. Consequently, the university delivers intensive outreach to students and their families throughout the recruitment process and those on-going retention efforts increase financial literacy. These continuous campaigns were systematized in 2015 to insure that student decision-making is informed and that students have adequate financial resources to achieve their educational goals throughout their academic career. In order to leverage the institutional and individual student benefit from the application of financial aid resources, Salem State initiated an in-depth, multi-year analysis of the impact of aid disbursements in 2017. This study will yield predictive analytics to guide the institution in targeting financial resources to those students with the most need, as well as the greatest likelihood of retention and completion, based on a number of factors.

The business model in higher education is increasingly challenged; Salem State is not immune. Annual increases for the majority of employee salaries and fringe benefits are not controlled by the university. In addition, the decrease in the population of college age students in Massachusetts (and beyond) have led to lower/flat enrollment growth statewide, creating a non-sustainable financial pattern. In addition, the university's investments in its physical plant to support student success and academic excellence have resulted in higher annual debt service, lease, and depreciation expenses. The Commonwealth (DCAMM) and the university recognize that significant deferred maintenance exists.

As noted under strengths, the university has re-organized multiple departments to increase efficiencies, break down traditional silos within the organization, and provide more streamlined, effective programs and services for students. These on-going changes take time, collaboration and negotiation. Uniting multiple offices to focus on clear, common goals, however, provides the leverage needed to foster continuous improvement and constructive change for students. While these transformations have increased collaboration and efficiencies, the opportunity to yield even greater benefits for students grows with more time.

As the demographics of the Commonwealth have changed in the past generation, so too has the makeup of Salem State's student body. While we now educate the most diverse student population among the nine state universities, our faculty/staff demographics have not kept pace. Because this lack of congruence between the student body and the faculty/staff has an impact on the teaching-learning enterprise, we are currently working intentionally and aggressively to bring these demographics into better alignment. Similarly, recent shifts in students' academic interests and workforce needs have created instances in which faculty/staff expertise is not always optimally aligned with areas of high programmatic demand.

On our campus, as in society, the individual student experience can vary greatly due to many factors. The university has initiated Inclusive Excellence training and improving bias reporting procedures to minimize the occurrence of micro and macroaggressions, as well as to respond swiftly and directly when they do happen. Mindful of the strength of our campus diversity and the power of constructive engagement, President Keenan has championed what he calls, "The Salem State Way," as a means to call the campus to engage in difficult discussions, honestly, openly, and respectfully.

While collaboration across campus has increased, the university community is in agreement that much more can be done. The understanding and implementation of a shared vision of Inclusive Excellence has only begun. In the spring of 2016 the president engaged Rankin and Associates Consulting, a nationally recognized firm that provides institutions with an examination of their current campus culture and provides a plan to lay the groundwork for future initiatives, leading to institutional transformation via maximizing equity. The firm worked with a campus climate working group to conduct a study for Salem State. Dr. Rankin presented the results of the study to the

campus in early November and an implementation team will continue to work with the campus community to transform the recommendations into actions.

Collaboration on the strategic planning process was successful, but the campus must embrace the university's goal of a culture of data-driven decision-making. More work is needed in putting the rubrics, data-collection, and analytical tools in place to create a stronger culture of assessment throughout the university. Providing increased employee/faculty training and professional development opportunities will be key to success, as well as strong leadership throughout the organization.

OPPORTUNITIES ANALYSIS

Students build self-esteem and critical social capital by learning and living in a diverse, inclusive community, enabling them to achieve their academic goals and increasing graduation rates. Employers value students with cultural competency skills and the ability to work effectively in teams. As the most diverse of all state universities, Salem State is working diligently to leverage this asset. Seniors and first-year students report that the university places an “emphasis on encouraging contact among students from different backgrounds,” at a rate 12 percent higher than among peer institutions (NSSE 2016.)

Preparing graduates to transition to their roles as productive citizens, contributing to the economy, is a critical goal for the institution, as well as for students, families, and the Commonwealth. The university recognizes the high-impact benefits of internships and experiential learning in preparing students for the work place. However, the proliferation of internship opportunities across campus with widely varying expectations, policies, and practices, has made it challenging to make such experiences consistently accessible, sustainable, and assessable. While internships create rich learning opportunities for students, the expansion of such opportunities has been challenging to manage systematically. As a result, the university must establish greater clarity in expectations for internships as we move toward establishing signature internship programs and better mechanisms to prepare and supervise students in such environments.

Through increasing the university's ability to oversee internship programs more systematically, the resources devoted to promoting and developing internships could yield greater benefits for students and the community, as the institution becomes a more consistently reliable partner in the process. Thus, opportunities abound for greater collaboration within the university and with the external community, including alumni, businesses, and non-profits, to create and promote internships and to offer a more streamlined and seamless experience for students, faculty, and community supervisors.

Graduate enrollment is strong and growth opportunities exist, particularly as professions impose new educational requirements on practitioners (masters in social work, masters in accountancy, masters of science in athletic training, and a clinical doctorate in occupational therapy all build on

existing, strong programs). Another opportunity the university is pursuing to meet the Commonwealth's goals to increase the educational level of the workforce is degree completion programs.

Future demographic and enrollment trends offer the opportunity for Salem State to explore the benefits and possibility of Hispanic Serving Institution (HSI) designation. The university is well-positioned to capitalize on this opportunity to serve the North Shore, through its focus on Inclusive Excellence. Programmatic initiatives in this area include, supporting student diversity, engaging the campus in developing cultural competencies, diversifying university faculty and staff, and eliminating barriers to success identified through the Campus Climate Study.

Increasing partnerships/couplings/articulations with PK-12 districts, community colleges, University of Massachusetts Lowell, and independent institutions in the region demonstrates the university's and public education's significance as a driving force for prosperity on the North Shore. Salem State works closely with the Salem Public Schools throughout the school year and hosts an elementary school on campus. The university also works with other cities including Lynn and Revere to provide both teacher education and programmatic support. And Salem State has a 20-year Upward Bound partnership with the city of Lawrence, including hosting summer residential programs on campus.

Moreover, the growing strength of partnerships with community colleges through collaborative programs such as the Commonwealth Compact, CommUniverCity, and the Early College PIF Grant, highlight Salem State as a destination for students regionally. In addition, administrative efforts to increase transfer pathways through MAST, Mass Transfer, and dual admissions agreements with regional community colleges (Bunker Hill Community College, North Shore Community College and Northern Essex Community College), which go beyond deferred admissions, serve to streamline opportunities for students and increase shared institutional enrollments.

Salem State University continues to strengthen its alignment and collaboration with the business, cultural, economic, and workforce strengths and needs of the North Shore region. Historically Salem State has partnered with businesses and non-profits to respond to workforce needs; to provide academic research for regional issues relative to economic development, sustainability and historic and cultural resources. Recently, Salem State has become involved in local and regional issues such as Youth at Risk, civic responsibility, veterans' support, LGBTQ rights, and addiction recovery. Additional partnerships and leadership include Salem State's central role in the founding and development of the North Shore Alliance for Economic Development and the university's Enterprise Center which houses and supports start-up and small businesses.

The university maintains signature partnerships with a wide variety of employers. Among these signature partnerships, are relationships with businesses in the area of accounting, the life sciences,

information technology, finance, and management. A specific example of Salem State leveraging its academic expertise to the benefit of regional and statewide economic development is the Cat Cove Marine Laboratory in Salem, which serves not only the North Shore, but many coastal communities throughout Massachusetts. In partnership with the Commonwealth, the laboratory produces seed clams which are distributed to cities and towns with dormant clam flats. Faculty and students participate in applied research and contribute to the sustainability of the coastal ecosystem. Cat Cove has partnered with Legal Sea Foods to establish a blue mussel long line aquaculture farm; the first offshore shellfish farm in federal waters on the Atlantic Coast and only the second in the U.S.

The university must expand the university's alternative modes of program delivery, including an increased focus on the credentialing needs of students. On-line offerings and alternative scheduling meet the needs of students who are returning to college later in life (post-traditional high school years), as well as students starting college while still in high school (early college efforts.) Salem State, similar to many sister institutions, serves not only first-time, full-time freshman students, but welcomes a significant number of transfer students from private colleges, public universities and community colleges.

Regionally, Salem State is a member of the Northeast Consortium of Colleges and Universities (NECCUM) through which students at member institutions (public and private) have the opportunity to take courses at and use the libraries of any of the NECCUM member institutions. The consortium is a venue for consultation with our region regarding programming opportunities. In addition, SSU is a partner in the Life Sciences Consortium of the North Shore, joining three other regional higher education institutions and North Shore Innoventures (a cleantech & biotech start-up incubator) to work collaboratively on advancing the tech community via workforce development, shared research space and instrumentation and research.

The university must continue to identify, cultivate and activate resources external to the campus community. First and foremost are our alumni, who live and/or work within our region. The recent capital campaign, the efforts of the Alumni Association, academic departmental engagement with their alumni, and the connections made with various student support offices such as the office of career services and athletics has increased stewardship opportunities. Collaboration towards shared external relational objectives will be one of the keys to overall success. Our alumni are also important to meeting our inclusion goals especially in recruiting faculty and staff and connecting with our students.

THREATS ANALYSIS

The Commonwealth has a number of important priorities vying for its limited resources. Available capital funding has proven inadequate to keep up with deferred maintenance or provide spaces of sufficient quality (suitability) and quantity to meet 21st century instructional needs. For Salem State, this is most urgently reflected in our lab sciences spaces, a critical challenge given the regional

workforce needs in the sciences and health-related fields. Securing funding for the Science Teaching Laboratory Addition is a high priority. Some of the university's physical academic infrastructure is obviously insufficient, which limits enrollment, faculty research and business partnership opportunities. Salem State has responded to the need for alternate delivery modes, such as on-line and hybrid. The university will be using the enrollment management, academic programming and marketing studies to identify additional opportunities for course delivery and the required academic technology infrastructure and faculty course design support needs.

The demographic decline in the Commonwealth's high school population will continue a downward trend in the foreseeable future. This has made the recruitment landscape increasingly challenging, though at present Salem State has been able to maintain a reasonably competitive position in an industry generally showing negative growth in New England. The strategies described above and below are key to serving future students successfully meeting the workforce needs of the Commonwealth and addressing the goals of the BHE's Big Three priorities.

STRATEGIC POSITIONING

BHE "BIG THREE" – Boosting College Completion; Closing Achievement Gaps; and Attracting and Graduating More Students from Underserved Populations

The proposed goals of Salem State's strategic plan include an emphasis on student success and academic excellence. In AY2007 Salem State had a first-time, full-time graduation rate of 37 percent; at the completion of AY2016 the rate rose to 52 percent. This achievement reflects the university's commitment to all students achieving their goal of earning a baccalaureate education. During this same period of time, achievement gaps closed with our African-American students achieving a 53 percent graduation rate and Latino students, a 42 percent graduation rate. Therefore, the university is confident the strategies in place to promote success are having a positive impact. The percentage of students of color in our student body has grown from 20 percent in AY2008 to 30 percent in AY2016; moreover, our entering class in fall of 2016 was 34 percent students of color, suggesting that the level of diversity will continue to rise. We are committed to continuing these trajectories of student access and success across all of our student populations including dual-enrollment, early college, transfer, and graduate students.

MAKING EXCELLENCE INCLUSIVE

Inclusive Excellence is Salem State's guiding principle for access, student success, and high-quality learning. This framework, adopted from the Association of American Colleges & Universities, helps Salem State integrate diversity, equity, and educational quality efforts into our mission and institutional operations. Making excellence inclusive is thus an active process for Salem State which responds to its historic mission of welcoming under-served diverse populations such as veterans, first-generation, ethnically and culturally diverse, LGBTQ, or individuals with disabilities. We will achieve excellence in learning, teaching, student development, institutional functioning, and

engagement in local and global communities. Inclusiveness and excellence are inter-dependent, as opposed to the traditional perspective that separates the two concepts. To practice inclusiveness is excellence; both are core values of the university.

SCIENCE & HEALTHCARE ON A LIBERAL ARTS FOUNDATION

Salem State has enjoyed a strong reputation for training students in science and healthcare disciplines, and has seen a decade of growth in these academic areas, despite limited facilities and a competitive marketplace. Nursing and biology are majors that are capped due to lack of adequate laboratory space. Nursing students are unable to take full advantage of simulation-based instruction because current facilities are limited in number. Clinical placements in many of the majors that requires them (nursing, occupational therapy) are increasingly difficult to secure, with looming threats by some healthcare partners to begin charging the university for each student placed. In partial response to these limitations, Salem State has added a healthcare studies program specifically designed for students interested in the healthcare and human service industry but who prefer to work in a non-licensed, non-clinical setting, further demonstrating the university's commitment to aligning its programs with one of Essex County's regional strengths and workforce needs. Critical to meeting these regional needs is the construction of the Science Teaching Laboratory Addition to Meier Hall and creation of additional simulation laboratories.

PLACE

Salem and the North Shore region of Massachusetts is a special place where the cultural, natural, and historical are intertwined with an entrepreneurial small business tradition. From the winding ocean fronts and rivers to the bustling seaports and mill towns, Essex County is distinctive. Salem State University's areas of academic excellence and civic connection promote the well-being and prosperity of the region and the Commonwealth. Founded as a Normal School to educate teachers in 1854, the university continues to lead in addressing the county's economic, educational, cultural, environmental, and workforce needs. Fostering the health and well-being of the region through education, healthcare, economic development, and social justice responds to the county's aging demographics and increasingly diverse population. Science and healthcare innovation, entrepreneurship, and workforce leadership advances economic growth. The university's academic expertise and research in the areas of coastal environment, cultural heritage, tourism, and arts and leisure safeguard local and regional resources. And, the Enterprise Center and the Small Business Development Center (SBDC) provide the community with timely and relevant support for small and large businesses.

CIVIC RESPONSIBILITY

Salem State has a historic commitment to civic engagement and civic learning, which has gained significant momentum with the investment of professional leadership in the Center for Civic

Engagement in 2015. The university strives to be an exemplar for civic engagement and civic learning leadership statewide, regionally, and nationally. Already having achieved the national President’s Honor Roll for Civic Engagement, our center partners internally with faculty and staff and externally with regional partners to provide our students with the pedagogy and experiential learning opportunities to become engaged members of their communities, the nation, and the world.

VISION-SUPPORTING OVERARCHING GOALS AND KEY STRATEGIES

The strategic positions and the university’s goals as reflected visually in Figure A. Financial Vitality and Sustainability, and Collaboration, Inclusion & Stewardship are foundational to achieving Academic Excellence and Student Success. The university has used the January 2016 NEASC Fifth-Year Interim Report^v as a guide and has aligned the duration of the plan to our decennial NEASC report in 2021.



GOAL: Financial Vitality and Sustainability - Strengthen Salem State’s financial foundation, align resources with priorities, and foster innovation to drive new revenue streams. Identify and implement additional opportunities to contain, reduce, or avoid future growth in costs.

Financial Vitality and Sustainability Strategies:

- Develop and implement a strategic enrollment plan based on information from three major initiatives undertaken in 2017: a marketability analysis, a financial leveraging study, and internal business intelligence work^{vi} that leverages program strengths, capitalizes on identified growth markets, and increases net tuition revenues. Specific programs that the

university will target for implementation are a B.S. in criminal justice administration, a B.S. in exercise science, a B.S. in healthcare studies, a B.S. in information technology, and the university will also pursue additional graduate degrees in nursing administration (M.S.), social work (D.S.W.) and occupational therapy (D.O.T.). In the context of the strategic enrollment plan, the university will expand alternative modes of course delivery in academic areas for which such innovations (e.g., online, hybrid, cohort-based, low-residency) are programmatically sound and fiscally prudent.

- Increase and diversify sources of non-tuition revenue to support ongoing operations and enable investment in strategic priorities, including expanded financial aid for students. Specifically, the university will increase summer conference revenue for the campus' residence halls and meeting spaces; evaluate further public-private opportunities such as leveraging the unique facilities to generate revenue streams via the university's Cat Cove Marine Center (such as the long-line blue mussel farm partnership with Legal Sea Foods) and the Enterprise Center's professional education programming. Increase applications and awards for external public and private grants.
- Increase the Salem State University Foundation's endowment by broadening our campus-wide culture of philanthropy and deepening engagement with Salem State alumni and the wider community.
- Perform ongoing and systematic analyses of academic programs to assess the relationship between required resources and (i) student demand/enrollment trends, (ii) workforce needs, and (iii) contribution to institutional mission; reallocate resources as appropriate to optimize student access to high-demand programs and sustain academic excellence.

GOAL: Collaboration, Inclusion, and Stewardship - Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship.

Collaboration, Inclusion, and Stewardship Strategies

- Establish Salem State as an institution embodying Inclusive Excellence that provides a culture of inclusion and belonging that fortifies SSU's reputation as a welcoming and diverse university committed to inclusion and equity.
- Intensify the culture of assessment and promote data-driven decision making in all aspects of the university's operations.
- Celebrate and showcase the accomplishments of faculty, staff, students, alumni, and the university itself; equip and engage members of the SSU community to be effective advocates and ambassadors in the wider community; and generate a stronger sense of pride and connection to place for all members of the campus community.
- Advance a leadership culture on campus that promotes shared responsibility and accountability for upholding Salem State's core values and behavioral norms.

GOAL: Academic Excellence - Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society.

Academic Excellence Strategies:

- Building on Salem State’s strength as a thought leader in the traditional arts and sciences (including the humanities, science and healthcare disciplines, the visual performing arts), health and human services (e.g., education, social work, nursing, occupational therapy, criminal justice), and business education, expand program enrollments that align with workforce needs through new program development, alternative mode of offerings including on-line, alternative scheduling options, and credentialing.
- Strategically align graduate programs with Salem State’s programmatic strengths, regional trends, and evolving entry-level degree requirements in the health and human services sectors to expand the enrollments to meet the regional workforce needs. This will be achieved, in part, by raising the visibility of these offerings.
- Leverage and seek to expand the contributions Salem State makes as a catalyst for economic growth and bring the university’s intellectual capital to bear on local issues to expand opportunities for students to have internships and other experiential opportunities that lead to increased post-graduation work placements.
- Provide up-to-date and environmentally friendly facilities and infrastructure, including information technology that meets evolving needs, advances teaching and learning, and attracts high-quality faculty, staff, and students to Salem State. Implement the next phase of the university’s Master Vision^{vii} including design and construction of the Science Teaching Laboratory Addition and for the next stage of the North Campus Precinct Study.
- Expand public awareness of Salem State’s academic strengths and institutional distinctions, and draw particular attention to the achievements and contributions of the university’s faculty, staff, students, and graduates. Champion SSU’s distinctive programs, academic pillars of excellence, and unique location as compelling differentiators in a competitive higher education landscape.
- Expand opportunities for civic learning and civic engagement through the implementation of active learning pedagogies

GOAL: Student Success - Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals.

Student Success Strategies

- Increase high school student participation in college through early college, dual enrollment, and pipeline programs (e.g., Upward Bound) targeted at communities with lower college attendance rates.
- Reinvent academic advising to provide comprehensive support for students including multi-year scheduling, curriculum/career maps, refined course offerings, and professional advisors to guide the first two years of study.
- Ensure student success by expanding high-impact programs (student research, study-abroad, internships, cohorts etc.) that prepare students for their future careers.
- Provide a student-centric culture of inclusion and belonging, fortifying SSU’s reputation as a welcoming and diverse university.
- Ensure students acquire necessary knowledge, skills, experiences, and sensitivity to be informed and engaged citizens who value diversity and champion social justice, civic responsibility, and Inclusive Excellence to promote a spirit of service and heightened sense of mutual responsibility among members of the campus community.
- Increase public awareness of the intrinsic value to students and the economy of coupling liberal arts majors with professional preparation programs.

BUSINESS PLANS

The Salem State University comprehensive strategic plan is supported by nine integrated component business plans. Each of these components impact the priorities and resourcing of the strategic plan. As cross-divisional planning groups review data and projections, the feasibility and availability of resources to support multiple priorities will be evaluated, and opportunities for consolidation and collaboration identified. This will strengthen the implementation of the strategic plan by assuring that the strategies are integrated, focused, and supportable.

Academic Affairs:

Salem State University will be widely known as the state university that confers affordable, high-quality degree for all students, with a focus on educating members of historically underrepresented communities. The university will also become a “first choice” institution of higher education for residents of the North Shore, widely known for an effective approach to fostering academic success for students of diverse backgrounds at various stages of their personal and professional careers. While maintaining its long-standing commitment to a strong educational core in the liberal arts, over the next four years, Salem State will emphasize growth in those disciplines that meet the current and projected needs of the region, including those requiring preparation in the sciences and healthcare. Undergirding the academic experience of every Salem State student will be commitments to the value of diversity, inclusion, and collaboration to foster a socially just and civically engaged society.

Capital Planning:

The success of the university and its strategic plan depends on providing the physical resources necessary for our students to succeed. Capital Planning (CP) supports the plan by working with all

areas of the institution to maintain, improve, and construct the physical resources that will advance the goals of the university. It will be guided by the Salem State University Master Vision 2040 (2013) and the North Campus Precinct Study (2017).

Community Outreach: The success of the university and its strategic plan depends on communication and collaboration both internally and externally. External Affairs (EA) and Public Relations (PR) support the plan by working with all areas of the institution and its external partners to promote the strategic concepts while making connections that will advance the goals of the university. This involves strong communication and transparency both within and outside the university. A key factor to the community outreach work that will benefit all five priorities of the strategic plan is enhancing the reputation of the university. This effort will increase our opportunities with external partners while also providing a sense of pride, place, and inclusivity within the institution. This work should focus around the key areas of the strategic plan and allow for all members of the internal community to be aware of, and have a voice in, campus priorities and happenings.

Enrollment Management/Marketing:

Salem State’s strategic enrollment plan will rely on information from three major initiatives. The marketability analysis (performed by industry leader, Stamats) will determine which of our current (or possibly new) programs have room to grow from an external market perspective. This work is largely complete and has identified a handful of undergraduate and graduate programs that have significant growth opportunity. A financial aid leveraging study (performed by industry leader Ruffalo Noel Levitz) will assist with decisions on how to best use our institutional aid to drive key institutional priorities, like enrollment growth and increased net tuition revenue. And, the university’s internal business intelligence work to help us identify “profit margin.” These three key initiatives will help to shape our enrollment strategy for the future, and allow us to move forward in a data-informed way.

Finance and Business:

The Finance and Business plan will continue to expand capabilities to improve the financial management of the university. This includes providing data and systems to support decision making and performing analyses to support strategic choices about investment or disinvestment in academic programs, capital assets and administrative activities. This business plan will generate additional revenue from underutilized assets.

Human Resources/Inclusive Excellence:

The Human Resources (HR) will advance the University’s strategic plan by providing superior service, support and opportunities critical to fostering a talented, diverse and engaged workforce. In partnering with Inclusive Excellence, HR views itself as an organizational leader in delivering employee excellence; recommending, supporting, and implementing personnel policies and procedures; providing employee development opportunities; and in partnering with key University

constituents and stakeholders to attract and retain an exceptional, diverse workforce. In collaboration with ITS and Finance and Business, HR strives to help senior management produce data driven decisions by seeking appropriate systems and infrastructure to support the employee environment as it relates to student success.

Information Technology:

Information Technology Services' (ITS) focus will be in three strategic areas. First, developing a campus-wide strategy and implementation of business intelligence to support data driven decision making by departments and senior leadership. Second, ITS will continue to support the creation of new programs by working with the deans and enrollment management to ensure systems and infrastructure are able to support such programs. And, third, ITS has embraced an Inclusive Excellence culture in three different areas; the classroom, the public facing website, and the academic computing environment, and will continue to expand these capabilities.

Institutional advancement:

Institutional Advancement (IA) seeks to foster inclusive relationship-building with our alumni, students, and friends, and involve our campus and community partners in the diverse community life of our university. IA will promote investment in the strategic priorities of Salem State University, such as the science teaching laboratories and scholarships to assist in eliminating financial barriers for students. We will connect donor passion with strategic plan priorities as well as engage alumni with our campus as resources for speakers, volunteers, mentors, and employer relation opportunities.

Student life:

Student life has recently reorganized to address the needs of Salem State students. The reorganization includes a cluster model, which brings together the eight student life departments to address three major themes: wellness, engagement and student experience/transition. To deepen the effectiveness of this model, our work will be approached with an emphasis on reducing redundancies and maximizing resources (human and financial capital); focusing on reaching depth of high impact practices for our students and systematizing practices so all students have the opportunity for personal development and learning. Specifically, student life will focus on increased student development and preparedness for a life of learning and personal success; greater retention and persistence of all students, with a focus on the “murky middle” and traditionally marginalized students; and higher student satisfaction in areas of living and learning.

METRICS

The following table presents the university-wide metrics for Salem State University’s strategic plan. The executive director of strategic planning and decision support is tasked with leading and supporting the campus with development of specific metrics for each strategy. The Collaboration Committee will provide oversight of reporting.

Key Metrics	Baseline FY2017	Goal FY2021
Financial Vitality & Sustainability:		
Total Enrollment (Fall 2016)	9,001	TBD
Endowment	\$28.5M	TBD
Operating Cash Flow Margin	2.16%	TBD
Gift Revenue to University	\$1,800,982	TBD
College Completion		
Six-year Graduation Rate All Students*	52%	62%^
Closing Achievement Gaps		
Six-year Graduation Rate Black - White*	-1.48	0.00^
Six-year Graduation Rate Hispanic - White*	-8.68	0.000^
Six- year Graduation Rate Male-Female*	-5.62	0.000^
Six-year Graduation Rate Pell-Eligible vs. Non-Pell-Eligible	-10.85	TBD
% Faculty of Color	19%	TBD
% Staff of Color	18%	TBD
Achieve Hispanic Serving Institution Status		TBD
Civic Engagement		
Achieve Carnegie Classification for Civic Engagement		2020
Workforce Development		
Open Science Teaching Lab Addition	Study Completed	TBD

*BHE Big 3

^Existing Commitments to BHE

ⁱ “Campus Climate” (also called the “college environment”) is defined as “the current attitudes, behaviors, standards, and practices of employees and students of an institution.” Positive personal experiences with the college environment and positive perceptions of the college environment generally equate to successful outcomes. These successful outcomes include: positive educational experiences and healthy identity development for students,

productivity and sense of value for faculty and staff, and overall well-being for all. The college environment is shaped through personal experiences, general perceptions and institutional efforts. The campus climate study is multi-stage process that allows us to measure people’s personal experiences and perceptions so that we can more thoughtfully address challenges and plan strategic initiatives to enhance the college environment. An external consultant, Rankin & Associates, was hired to work with our community to develop a survey to administer to the entire Salem State community, to analyze and present the results of that survey and to establish a community implementation team to oversee the use of the data and ensure that concrete actions follow from the results of the survey.

ii http://nerche.org/index.php?option=com_content&view=article&id=341&Itemid=618

iii Salem State University has aligned its strategic plan with its decennial New England Association of Schools & Colleges (NEASC) accreditation report in 2021. https://records.salemstate.edu/sites/records/files/reports/2017-04/NEASC_Report_for_Salem_State_University_01.19.2016.pdf

iv <https://www.salemstate.edu/offices-and-services/facilities/capital-planning-and-facilities-management>

v https://records.salemstate.edu/sites/records/files/reports/201704/NEASC_Report_for_Salem_State_University_01.19.2016.pdf

vi Salem State’s strategic enrollment plan will rely on information from three major initiatives:

1. Marketability Analysis (performed by industry leader, Stamats) – to help us determine which of our current (or possibly new) programs have room to grow from an external market perspective. This work is largely complete and has identified a handful of undergraduate and graduate programs that have significant growth opportunity
2. Financial Aid Leveraging study (performed by industry leader, Ruffalo Noel Levitz) – to help us determine how to best use our institutional aid to drive key institutional priorities, like enrollment growth and increased net tuition revenue. This work will be complete by the end of December.
3. Internal business intelligence work – to help us determine program “profit margin”

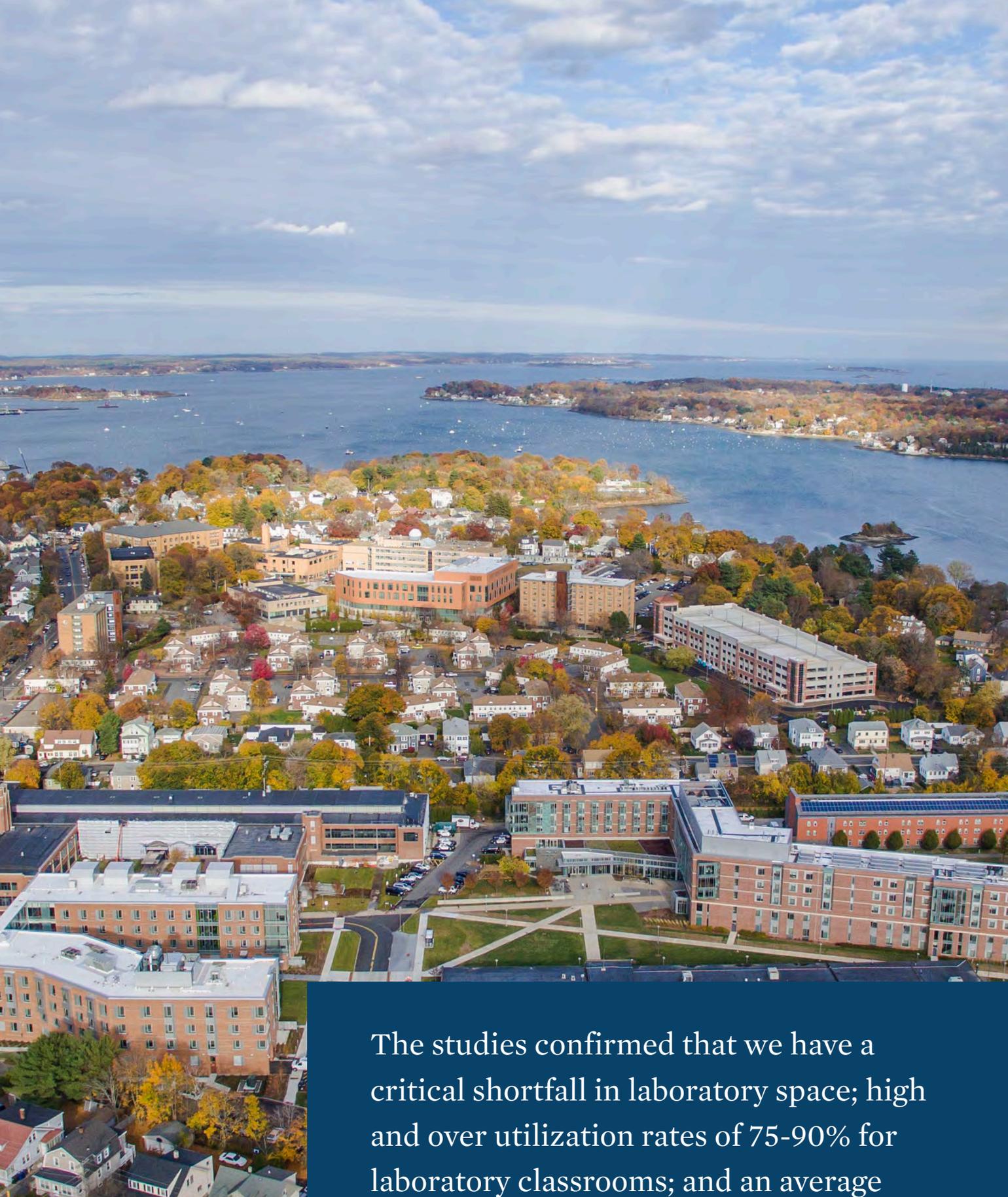
These three key initiatives will help to shape our enrollment strategy for the future, and allow us to move forward in a data-informed way.

vii See Note iii above.

Science Teaching Laboratory Addition

Salem State University

December 2017



The studies confirmed that we have a critical shortfall in laboratory space; high and over utilization rates of 75-90% for laboratory classrooms; and an average enrollment in lab courses of 100%, which results in filling every lab offered.



Science Teaching Laboratory Addition

Why this project?

DCAMM studies in 2007 and 2013 established that Salem State University's current science laboratories, located in Meier Hall, are insufficient and unsuitable for renovation to 21st century laboratory standards.

The studies confirmed that Salem State University (SSU) has a critical shortfall in laboratory space; high and over utilization rates of 75-90% for laboratory classrooms; and an average enrollment in lab courses of 100%, which results in filling every lab offered. SSU leads the state university system in biological and biomedical sciences; physical sciences; and health professions and related programs, enrolling 26.5% of all courses in these areas. Although SSU is a system leader in the education and development of scientists, nurses, occupational therapists and health science professionals on the North Shore and throughout Massachusetts, insufficient and outdated laboratory space limits our ability to meet workforce needs regionally and throughout the Commonwealth. In response to these findings, SSU requests funding for a science teaching laboratory addition (STLA) to Meier Hall (MH).

Our labs are used for a broad range of coursework for science majors, as well as, support courses for health disciplines and general education requirements. SSU's strategic plan, which was recently approved by the Board of Higher Education, recognizes the importance of enrollment growth in these areas to the



Commonwealth's workforce and confirmed that STLA will meet student and industry demand for science and healthcare degrees and credentials. Our current laboratory capacity is inadequate to meet both these demands and our pedagogy. STLA will provide much needed and modernized space for biology, chemistry and geology majors; will allow for greater flexibility in course scheduling, student and faculty research, and alternative delivery methods; and will free up space in MH to better serve general education and support courses.

STLA is a top priority of the university's 2013 Campus Master Vision plan. High-quality laboratory space was identified as key driver for programmatic growth, which is limited by our existing facilities. Current structural conditions prohibit the modernization of existing labs and the installation of state-of-the-art equipment to train our students. STLA's 20 teaching and research labs would not only allow for the upgrades necessary to educate our students in 21st century laboratories and to address lab safety upgrades, but would also enable the repurposing of existing laboratories in MH into dry labs, classrooms and offices, supporting the ultimate goal consolidating our academic functions on South Campus to North and Central Campuses.

STLA will support the growing and high demand workforce needs in biotechnology, bioscience, pharmaceutical, nursing and allied health industries that are strengths of the North Shore.

SSU academic programming is well aligned with the workforce needs of the region and is a major provider of science and healthcare BS/BA+ degrees for the North Shore and beyond. A recent study by the North Shore Workforce Investment Board has documented the increasing need for these employees as the incumbent regional workforce reaches and passes retirement age. STLA will support the growing and high-demand workforce needs in biotechnology, bioscience, pharmaceutical, nursing and allied health industries that are strengths of the North Shore.

STLA also aligns with the Commonwealth's priorities by replacing unsuitable facilities with modern scientific teaching spaces, which will allow for the expansion of scientific and healthcare disciplines. The project supports Massachusetts' goals of ensuring it remains a global leader in life sciences by investing in human

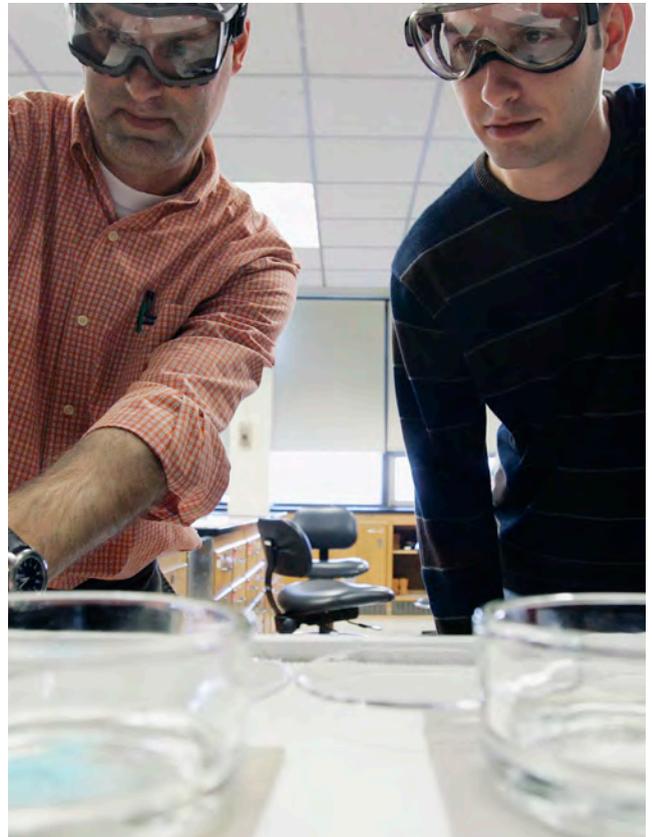
As the only state university without 21st century laboratories, SSU will become significantly challenged to meet its mission for both our students and the region we serve without STLA.



capital and workforce development, and preparing our graduates for careers in these fields in up-to-date facilities. Construction of a laboratory-only addition will bring our infrastructure in line with the functionality and instrumentation of the region's STEM and healthcare industries and will expand our ability to deepen programmatic collaborations with regional education, non-profit and industry partners. Regional partners provide some exposure to modern infrastructure via internships and part-time employment, but this is not enough to fully prepare our graduates for their future occupations.



Additionally, STLA supports the DHE Big 3 goals of college participation, college completion and closing achievement gaps. Although SSU graduation rates have increased, retention has improved, and SSU has been a system leader in closing achievement gaps over the past 10 years, our laboratory limitations restrict growth in some STEM areas. For example, SSU has capped admissions to biology and nursing programs due to the lack of adequate laboratory space. As the most diverse of the state universities, our changing demographic compounds the need to improve our lab spaces so that we can continue to close the achievement gap in these important fields.



Despite outdated and unsuitable laboratory infrastructure, our talented faculty educate majors in the STEM and health sciences fields as well as all students with complementary coursework valued by industry in business, liberal arts and education. Our alumni are valuable assets to the North Shore region and beyond. With the demographic shifts and the growing occupational opportunities of the North Shore, we need to make sure our graduates are prepared with the most up-to-date facilities available. As the only state university without 21st century laboratories, SSU will become significantly challenged to meet its mission for both our students and the region we serve without STLA.

Campus Master Plan

STLA Alignment with Campus Master vision

Completed in July 2013, the Salem State University (SSU) Campus Master Vision establishes a plan for the institution's presence in the greater North Shore region—a plan rooted in the academic mission of the university and one that advances its role in community and economic development. The Campus Master Vision builds on and extends the ideas originally communicated in the 2007 Campus Master Plan. The Science Teaching Laboratory Addition (STLA) has been a consistently documented need in each of the planning studies, and was the subject of a follow-up, more detailed feasibility study completed in 2014.

Four key principles govern the 2013 plan: flexibility, connectivity, identity, and community. These principles reflect the university's aspirations to establish a compact and efficient campus core that maximizes programmatic synergies and consolidates Salem State's footprint within its Central and North Campuses. In so doing, SSU divests of much of its South Campus facilities and, accordingly, reduces overall deferred maintenance liability.

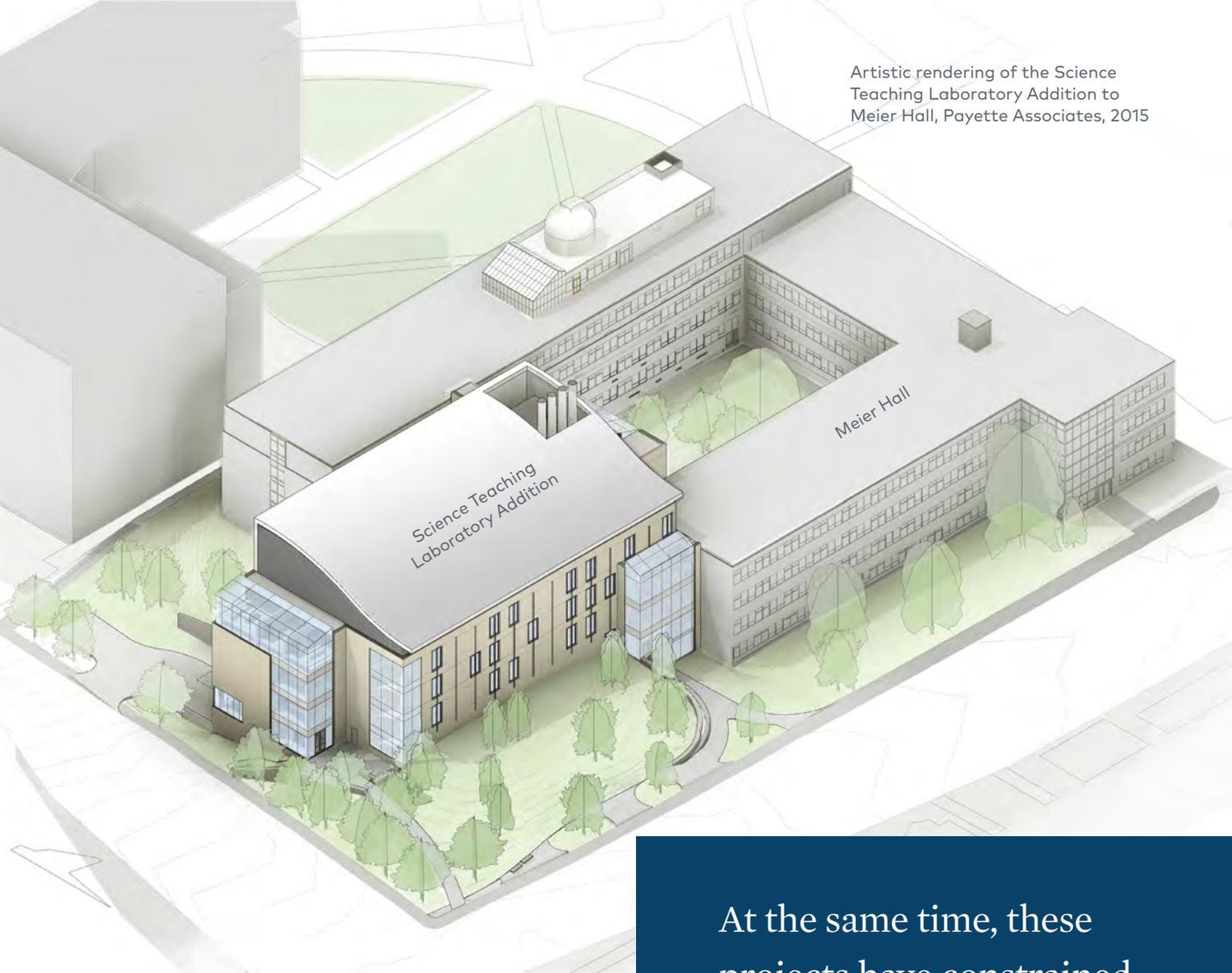
Since completion of the 2007 and 2013 planning efforts, SSU has successfully completed numerous projects to improve both the academic and student experience while addressing deferred maintenance issues within ageing buildings and infrastructure. Some of these projects were completed in partnership with DCAMM, including full state funding for the Frederick E. Berry Library and Learning Commons and partial state funding (roughly 27.5%) for Sophia Gordon Center for the Creative and Performing Arts Center renovation. Other projects were completed in collaboration with MSCBA, which issued bonds that are repaid by student fees, including the Harold E. and Marilyn J. Gassett Fitness Center, Viking and Marsh Residence Halls, and the North Campus Parking Garage.

These principles reflect the university's aspirations to establish a compact and efficient campus core that maximizes programmatic synergies and consolidates Salem State's footprint within its Central and North Campuses.

Salem State University has also funded various leases and fit-outs to accommodate administrative needs (preserving core campus buildings for academic functions) with operating funds. All of these projects demonstrate a strong commitment to implementing the Campus Master Vision, and exhibit the university's willingness to contribute our own funds toward making the Vision a reality. At the same time, these projects have constrained our capacity to fund and implement a critical project of the size and scale of STLA.

STLA remains the highest priority project for the university, and closely aligns with our academic plan and the needs of the Commonwealth's workforce. The current science facilities in Meier Hall (MH) limit our ability to meet the demand of STEM courses both for science majors and for health disciplines as well as general education requirements. The 2013 Master Vision plan documents the hyper-utilization of MH labs, both from a seat fill rate (often 100%) and room use rate (75-90%), well in excess of Massachusetts' space standards.

The STLA project is not only a high priority in terms of academic need, but is also the highest priority deferred maintenance project for SSU. Various studies have concluded that Meier Hall is not suitable for wet laboratory uses due to low ceiling heights and mechanical system limitations—the key factors that led to the conception of STLA. Meier Hall, however, does offer important programmatic space (dry lab, classroom, and office) to allow the university to



subsequently address deferred maintenance issues in many other of its buildings, including Sullivan Hall, the Horace Mann Building, Ellison Campus Center, the Dining Commons, and divestment of 92,000 gross square feet of South Campus facilities, much of which are in poor condition.

In this way, STLA becomes the critical domino for reducing the university's deferred maintenance liability while also realizing its academic mission. Similar to the Frederick E. Berry Library and Learning Commons Project, capital investment by the Commonwealth in the Science Teaching Laboratory Addition, will position SSU to address other deferred maintenance projects in smaller increments.

At the same time, these projects have constrained our capacity to fund and implement a critical project of the size and scale of STLA.



The divestment of South Campus represents a significant opportunity for SSU and the Commonwealth. Many buildings on South Campus are in poor physical condition with a total of \$42.5M in deferred maintenance. The isolation of this area also complicates class scheduling, transportation and parking. Investing \$42.5M in deferred maintenance in this property would only keep it operational in its current capacity and would not account for

renovations that would bring a former parochial school to an expanded, modern nursing laboratory building. Rather than invest that money to maintain inadequate space, the university would like the Commonwealth to divest from this campus and invest in STLA. STLA would be a purposely-built facility that would meet our current academic demands and industry standards, as recommended by DCAMM studies in 2007, 2013 and 2015 and Sightlines 2017.

#	Building Name	Primary Use	Campus	Funding Source
1	Harold E. and Marilyn J. Gassett Fitness Center	Academic and Student Services	O'Keefe Athletic Complex	Debt Funded Project and Private Donation*
2	North of Loring Parking Lot (Weir/Stanley property)	Parking	Central Campus	Debt Funded Project
3	Stanley Building	Academic and Administrative	Central Campus	Federal Grant
4	Viking Residence Hall	Student Services	Central Campus	Debt Funded Project
5	Renovation of Student Navigation Center	Student Services	Central Campus	Debt Funded Project
6	Renovation of university police department	Administrative	Central Campus	Debt Funded Project
7	Marsh Residence Hall	Student Services	Central Campus	Debt Funded Project
8	331 Lafayette Street Lease: Administrative Offices	Administrative	Other	Operating Budget
9	Renovation of Administration Building	Academic and Administrative	North Campus	Operating Budget
10	Sophia Gordon Center for the Creative and Performing Arts	Academic	North Campus	Debt Funded, Operating Budget, Private Donation, and DCAMM (27.5%)
11	Frederick E. Berry Library and Learning Commons	Academic and Student Services	North Campus	DCAMM
12	Parking Garage	Parking	North Campus	Debt Funded Project
Off Map	287 Lafayette Street Lease: School of Social Work	Academic	Other	Operating Budget

- Recent projects, leases, or acquired property
- Science Teaching Laboratory Addition
- Deferred maintenance to be addressed through renovations and South Campus program consolidation
- South Campus divestment

*Debt Funded Project: Project funded by MSCBA issued bonds that are repaid by student fees



Institutional Profile

About Salem State

Salem State's 163-year history reflects the growth of its mission and its vital role in the nation, the Commonwealth and the local community. From its beginnings as a teaching college to the large, diverse and comprehensive academic institution it is today, the university has remained true to the value of its founders, and continually seeks a forward path, adapting to society's changing needs while ensuring the intellectual and material well-being of the North Shore region of Massachusetts and beyond.

Located just 15 miles north of Boston, Salem State is one of the largest and most diverse state universities in the Commonwealth of Massachusetts and is an important partner in the economic, cultural and intellectual vitality of the greater north-of-Boston region. Situated in the historic seacoast city of Salem, Massachusetts on more than 115 acres and





five campuses, Salem State provides a diverse community of over 9,000 students, a high quality, student-centered education; one that prepares them to contribute responsibly and creatively to a global society and to serve as a resource to advance the region's cultural, social and economic development.

The university supports a full-time faculty of over 350 and offers 32 undergraduate degree programs in the liberal arts and sciences, health and human services, education, and business, along with graduate programs that offer degrees in 24 fields such as education, science, humanities, business, criminal justice, and nursing, among others. The university also has a continuing education division that offers both credit and non-credit programs.

Salem State's faculty represent a wide variety of academic institutions including the most prestigious in the country and the world. The university has been

recognized twice in the past five years as being among the top producing institutions of Fulbright Scholars. Faculty hold a deep commitment to teaching and learning and pride themselves on connecting with students at an individual level. Student learning opportunities are personal and collaborative, yet large enough to broaden students' understanding of their world.

The university's students hail from 28 states and 63 countries. The university is proud that 35 percent of its 2016 freshman class self-identified as being students of color. Salem State has over 65 student groups and clubs, 15 varsity teams along with intramural sports, and hundreds of student activities scheduled throughout the year. The university has a nationally award-winning residence life program. One-third of the undergraduate degree-seeking population, including two-thirds of the freshman class, lives on campus.



Located just 15 miles north of Boston, Salem State is one of the largest and most diverse state universities in the Commonwealth of Massachusetts and is an important partner in the economic, cultural and intellectual vitality of the greater north-of-Boston region.

Indicators of 21st Century Growth

	2006	2016	Change
Total Revenues	\$106.8M	\$164M	53%
Campus (number of buildings)	20	29	45%
Campus (total square feet)	1,152,221	2,046,328	78%
Degrees Awarded	1,434	2,214	54%
Graduation Rate*	37%	52%	+15%
Students of Color Enrollment	14.80%	29.40%	+15%
Hispanic/Latino Student Enrollment	4.80%	12.90%	+8%
Full-time Faculty	320	351**	10%
Resident Students (Housing Capacity)	1,404	2,282	63%
International Partnerships	3	25	733%
Community Service Hours	1,281	359,891	27995%

FTE Enrollment in Science and Healthcare Courses

Health Professions and Related Programs	350	548	57%
Physical Sciences	381	464	22%
Biology & Biomedical Sciences	330	489	48%



*Data is from 2007 and 2017 (projected)

**2015 IPEDS data

Points of Pride

Salem State University

As an institution, Salem State has made significant gains over the last ten years, and is poised to continue that trend through strategic investment in its people, its facilities, and the broader North Shore community. Specific achievements are highlighted here.

University Status—In 2010, Salem State College became Salem State University, a legislated change in status which reflected the large, comprehensive institution the university had become. University status brought greater recognition to the high quality of Salem State's academic programs and the many accomplishments of its faculty and students. With the university designation, Salem State expanded academic programming grounded in the expertise of its faculty and designed to address the changing needs of its community and workforce. Among many highlights, Salem State's School of Social Work was ranked #91 (of over 250 programs) by US News & World Report in 2016 and is the highest ranked public program in Massachusetts.

Increased Graduation Rates—Student success is Salem State's key goal. From 2007 to 2016, the graduation rate for baccalaureate students increased 15 percentage points—the largest change in the state university system. Salem State's six-year graduation rate for first-year freshmen increased from 37 percent in 2007 to 52 percent in 2016, with a graduation rate for transfer students at 67 percent. This growth reflects the exceptional efforts of faculty and staff to support students, and the university continues to set aggressive goals in the area of student success.

Diverse Community—Salem State University is the most diverse public university in the Commonwealth with over 29 percent of the student population from underrepresented backgrounds. In addition, over 35 percent of students identify as first generation college students. Salem State is known for its culture of

inclusion and, over the last five years, the university has expanded cultural and identity based programs and dialogues. Given population trends, the university is preparing to be a Hispanic Service Institution in future years.

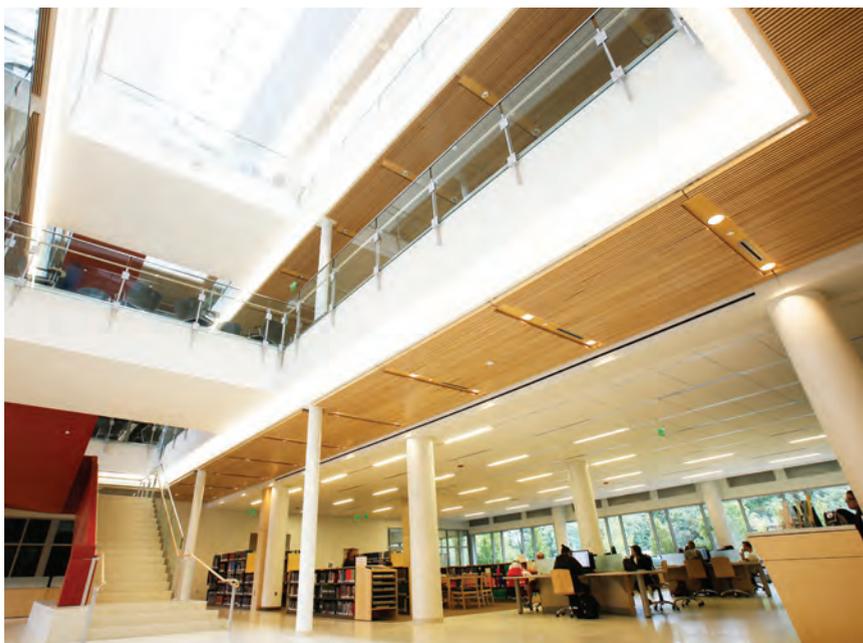
New State-of-the-Art Academic and Student Life Spaces—Changes to the physical campus over the past decade are profound. Nearly 760,000 square feet of new construction and renovations have been completed or are underway, bringing state-of-the-art academic and student life spaces to campus. Through the support of the Commonwealth of Massachusetts and generous donors, combined with resources of the university's operating budget, and issued debt to be repaid by student fees, over over \$250 million has been invested in campus improvements. Highlights of these changes include the Frederick E. Berry Library and Learning Commons, the Sophia Gordon Center for Creative and Performing Arts, the Harold E. and Marilyn J. Gassett Fitness Center, athletic fields and courts, and two residence halls that provide accommodations for nearly 900 students. Funding for a new Science Teaching Laboratory Addition is the top priority to meet the strong demand for science, healthcare and technology programming.

Residential Campus—In recent years, Salem State has shifted from a commuter campus to a more residential campus. Currently, one-third of the undergraduate degree-seeking population lives on campus, one-third lives in local neighborhoods, and the remaining third commutes from home. In addition to new residential facilities, Salem State has also added a new student life co-curriculum.

A Successful Comprehensive Fundraising Campaign that Raised Over \$26 Million—In December of 2016, Salem State announced the successful completion of the university's first comprehensive campaign. Exceeding its \$25 million goal, over \$26 million was raised during the campaign from more than 11,000 donors, with a remarkable 93 percent participation rate among faculty and staff. The funds resulted in the establishment of 48 new scholarships for students and much needed financial support for academic programs.



Changes to the physical campus over the past decade are profound... Funding for a new Science Teaching Laboratory Addition is the top priority to meet the strong demand for science, healthcare and technology programming.



Salem State University

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John David Keenan, JD

Presidential Review

2016-2017

Addendum

April 26, 2018

TABLE OF CONTENTS



Access/College Participation	2
Enrollment Rates	2
College Participation	3
Closing Achievement Gaps	5
College Completion/Student Success	10
Retention Rates	10
Graduation Rates	10
Healthcare & STEM	11

Access/College Participation

a. Enrollment Rates

Salem State has not been immune to the declining enrollment that has become a regional and national phenomenon. This decline can be explained by the decreasing numbers of high school graduates and the shifting demographics. In terms of our graduate program, we have witnessed a decline in our fall '17 headcount but a significant increase in credit hours during this same time (see Table I).

Table I: Fall and Annual Headcount and Credit Hours

Fall Headcount	Fall 2015	Fall 2016	Fall 2017
Fall Headcount Total	9,215	9,001	8,702
Undergraduate Headcount	7,499	7,346	7,110
Graduate Headcount	1,716	1,655	1,592
Fall Credit Hours	Fall 2015	Fall 2016	Fall 2017
Fall Credit Hours Total	106,608.0	105,702.5	103,879.5
Undergraduate Credit Hours	95,900.0	94,878.5	92,537.5
Graduate Credit Hours	10,708.0	10,824.0	11,342.0
Annual Unduplicated Headcount	FY 2015	FY 2016	FY 2017
Annual Headcount Total	11,633	11,497	11,057
Undergraduate Headcount	9,248	9,084	8,823
Graduate Headcount	2,338	2,342	2,166
Both Undergraduate & Graduate	47	71	68
Annual Credit Hours	FY 2015	FY 2016	FY 2017
Annual Credit Hours Total	229,879.5	228,130.5	225,245.0

Undergraduate Credit Hours	202,651.5	200,192.5	197,400.0
Graduate Credit Hours	27,228.0	27,938.0	27,845.0
Annual FTE	FY 2015	FY 2016	FY 2017
Annual FTE Total	7,889.2	7,835.0	7,738.3
Undergraduate FTE	6,737.1	6,649.6	6,560.8
Graduate FTE	1,112.8	1,123.8	1,114.4
Both Undergraduate & Graduate FTE	39.3	61.6	63.2

b. College Participation

Salem State continues to have the highest percentage of undergraduate students of color, combined, and also Latinx students, separately, for all of the Massachusetts State Universities. We share the top rank for African American students with Bridgewater State University (see Table II).

Table II: Total Enrollment by Race/Ethnicity

	2015	2016	2017
Salem			
White	75%	74%	71%
Latinx	11%	12%	14%
African American	8%	8%	9%
Other Known Race/Ethnicity	6%	6%	6%
Bridgewater			
White	81%	80%	79%
Latinx	6%	6%	6%
African American	8%	9%	9%
Other Known Race/Ethnicity	5%	5%	6%
Fitchburg			
White	86%	85%	84%
Latinx	6%	6%	7%
African American	4%	5%	5%

Other Known Race/Ethnicity	4%	4%	4%
Framingham			
White	81%	79%	76%
Latinx	8%	9%	10%
African American	5%	5%	7%
Other Known Race/Ethnicity	6%	7%	7%
Mass Maritime			
White	90%	89%	90%
Latinx	3%	4%	4%
African American	3%	2%	1%
Other Known Race/Ethnicity	4%	5%	5%
Mass Art			
White	76%	73%	72%
Latinx	10%	12%	12%
African American	4%	4%	5%
Other Known Race/Ethnicity	10%	11%	11%
MCLA			
White	81%	80%	81%
Latinx	6%	7%	6%
African American	8%	8%	8%
Other Known Race/Ethnicity	5%	5%	5%
Westfield			
White	81%	80%	79%
Latinx	9%	9%	10%
African American	5%	5%	5%
Other Known Race/Ethnicity	5%	6%	6%
Worcester			
White	80%	80%	79%
Latinx	7%	8%	8%
African American	7%	6%	6%
Other Known Race/Ethnicity	6%	6%	7%

In terms of the gender gap, the national trend continues. That is, the percentage of males enrolling in higher education continues to decline. Where for the last two years we held steady at 36%, FY 17 saw a 1% decrease (see Table III).

Table III: Gender distribution by percentage, Male

	2015	2016	2017
Salem	36%	36%	35%
Bridgewater	39%	39%	39%
Fitchburg	31%	30%	30%
Framingham	29%	30%	31%
Mass Maritime	86%	85%	85%
Mass Art	31%	29%	30%
MCLA	36%	35%	35%
Westfield	42%	37%	43%
Worcester	33%	34%	33%

Closing Achievement Gaps

We were extremely proud to be recognized by The Education Trust as one of the top ten institutions closing the achievement gap for Latinx students. We have set an ambitious goal of eliminating the achievement gaps (black-white, Hispanic-white, male-female) for six-year graduation rates over the next four years (see Graph I).

Trends: Closing Latino/a vs. White Gaps in Graduation Rates

Is progress being made in reducing gaps between Latino/a vs. White students in graduation rates, or are they worsening over time?

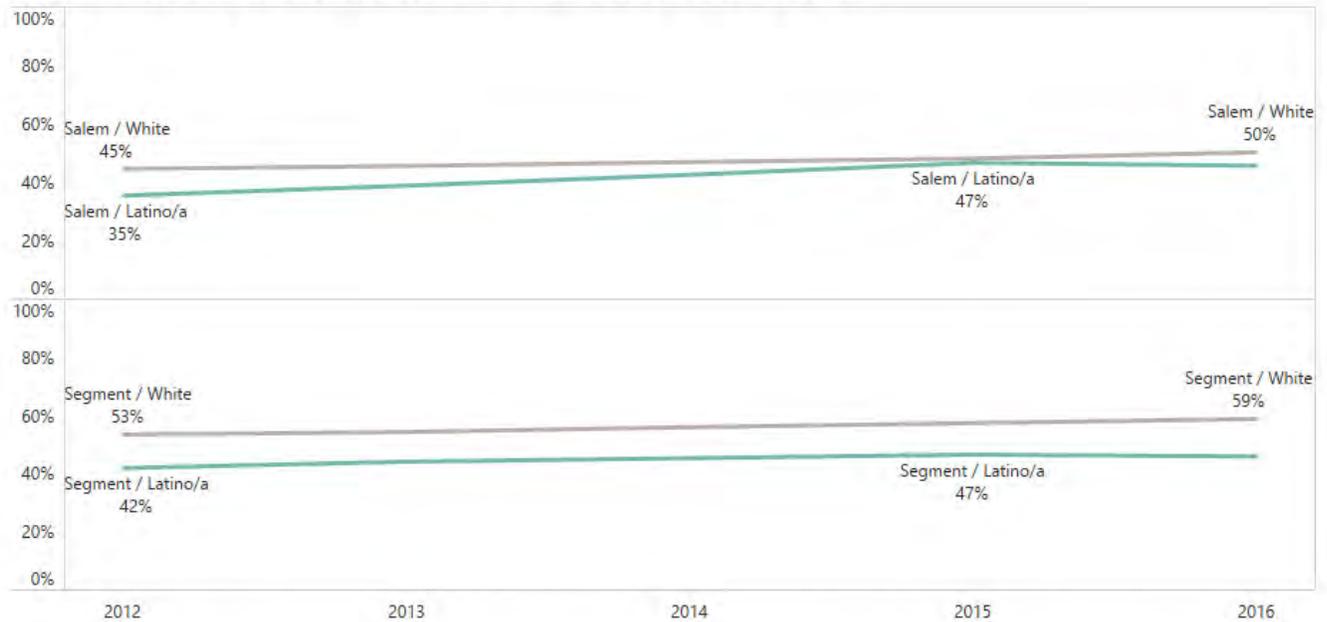
Choose Another Institution for Comparison:

Salem

Choose Another Comparison Set:

Latino/a vs. White

State Universities: Gaps in Six-Year Graduation Rate (2012 to 2016)



Graph I

The achievement gap by gender continued its increase. To that end, we are being intentional in addressing this ongoing issue as evidenced by the Men of Color Learning Community (referenced earlier in the report) and its 100% retention rate (see Graphs II and III).

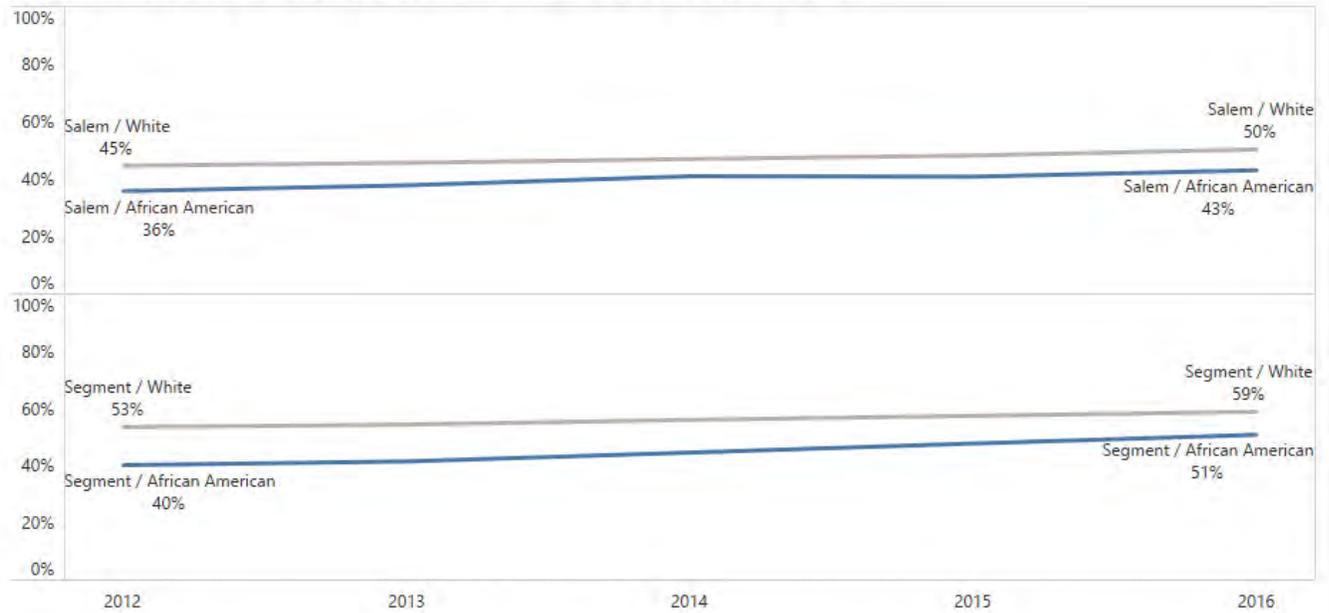
Trends: Closing African American vs. White Gaps in Graduation Rates

Is progress being made in reducing gaps between African American vs. White students in graduation rates, or are they worsening over time?

Choose Another Institution for Comparison:
Salem

Choose Another Comparison Set:
African American vs. White

State Universities: Gaps in Six-Year Graduation Rate (2012 to 2016)



Graph II

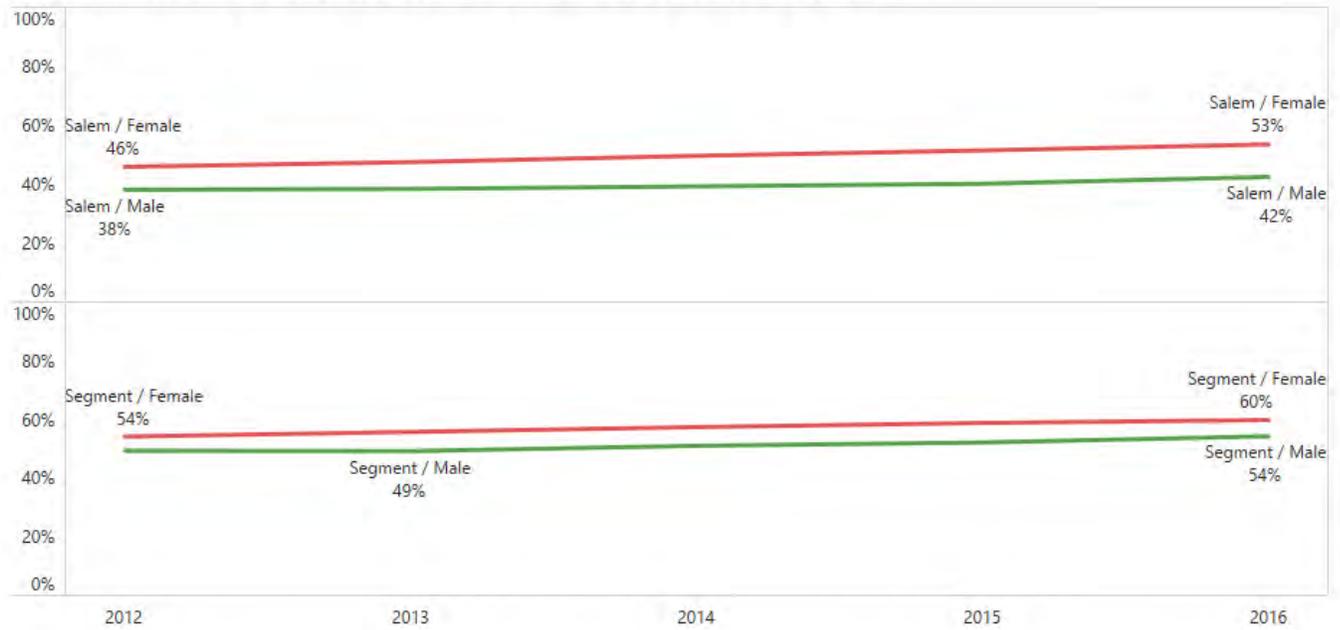
Trends: Closing Male vs. Female Gaps in Graduation Rates

Is progress being made in reducing gaps between Male vs. Female students in graduation rates, or are they worsening over time?

Choose Another Institution for Comparison:
Salem

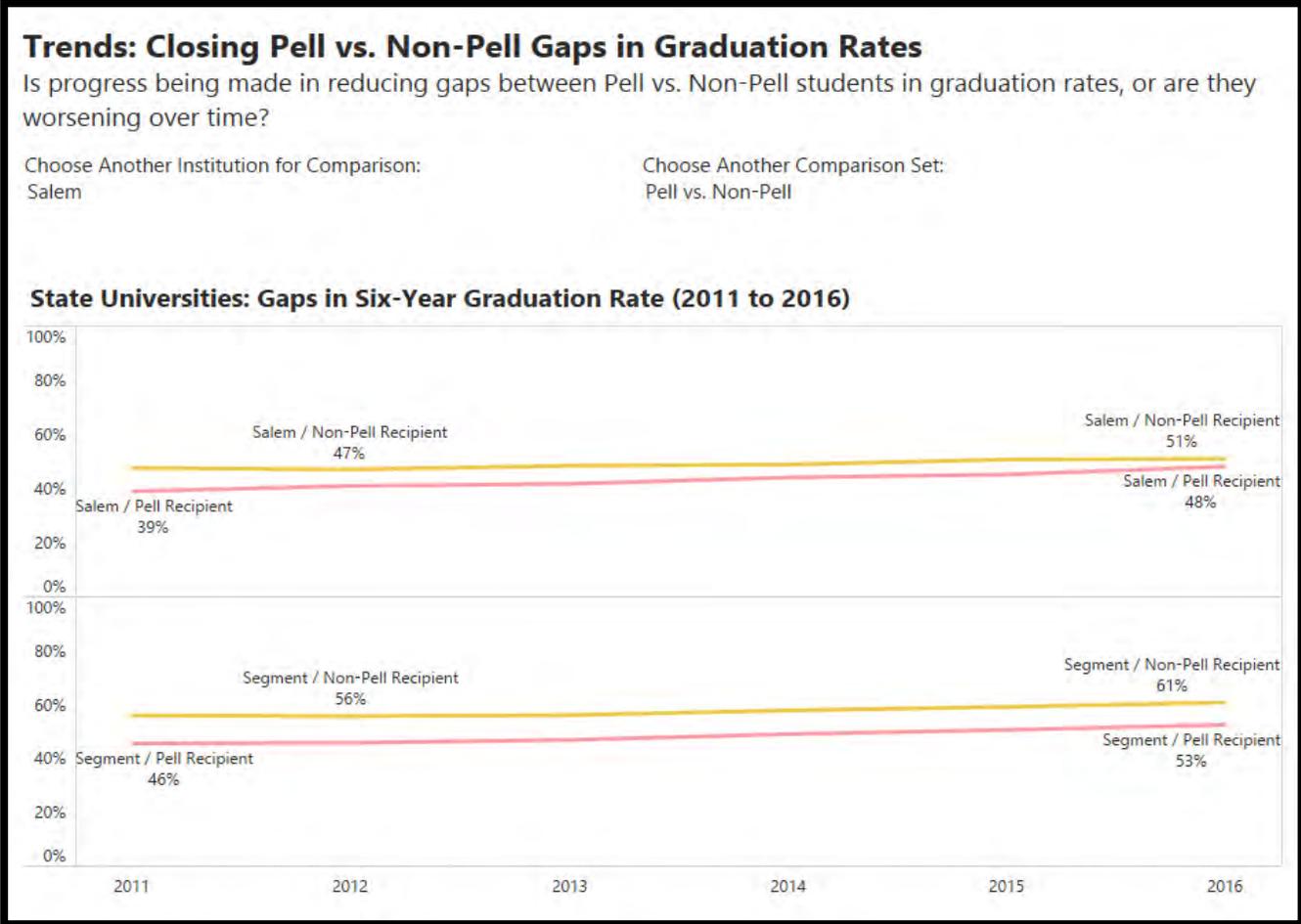
Choose Another Comparison Set:
Male vs. Female

State Universities: Gaps in Six-Year Graduation Rate (2012 to 2016)



Graph III

Salem State has one of the highest percentages of Pell eligible students in the state university system. Several factors contributed to the university’s success in closing the achievement gap for Pell eligible students. With the opening of the Student Navigation Center, we increased our efforts around financial literacy and expanded our work counseling financially at-risk students to assist them in managing the cost of attending the university. Efforts to inform parents about the business of being a student were increased to establish clearer expectations. Other institutional efforts to support student success included the Mapworks early warning survey and a robust First Year Experience program for students. MapWorks, in particular, has also provided valuable insight about this population, resulting in increased outreach and guidance around progression and resources (see Graph IV).



Graph IV

College Completion/Student Success

a. Retention Rates

After several years of steady progress, retention rates have slipped. Retention rates have been a priority for the university, as many resources have been devoted to increasing support services and providing a high quality living, learning experience. Resources have also gone into identifying why students are leaving. Some of the reasons include; 1) Affordability – some students with strong GPAs and low EFCs leave to attend a community college. Salem State hopes to counter this practice with our new financial aid leveraging strategy to focus aid where it is needed most. 2) Students with very low GPAs transfer to community colleges or drop out altogether. This occurrence is not surprising considering the shifting demographics in our catchment area. The university also completed the second year of a test optional pilot program to increase access to the institution for students who might not otherwise be considered (see Table IV).

Table IV: 1 Year Retention Rate – Salem State University

Fall Term	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
1 Year Retention Rate - Full Time Freshman	81.17%	79.86%	79.11%	77.17%
1 Year Retention Rate - Full Time Transfer*	81.77%	84.62%	82.19%	83.03%
*includes retained or graduated				

b. Graduation Rates

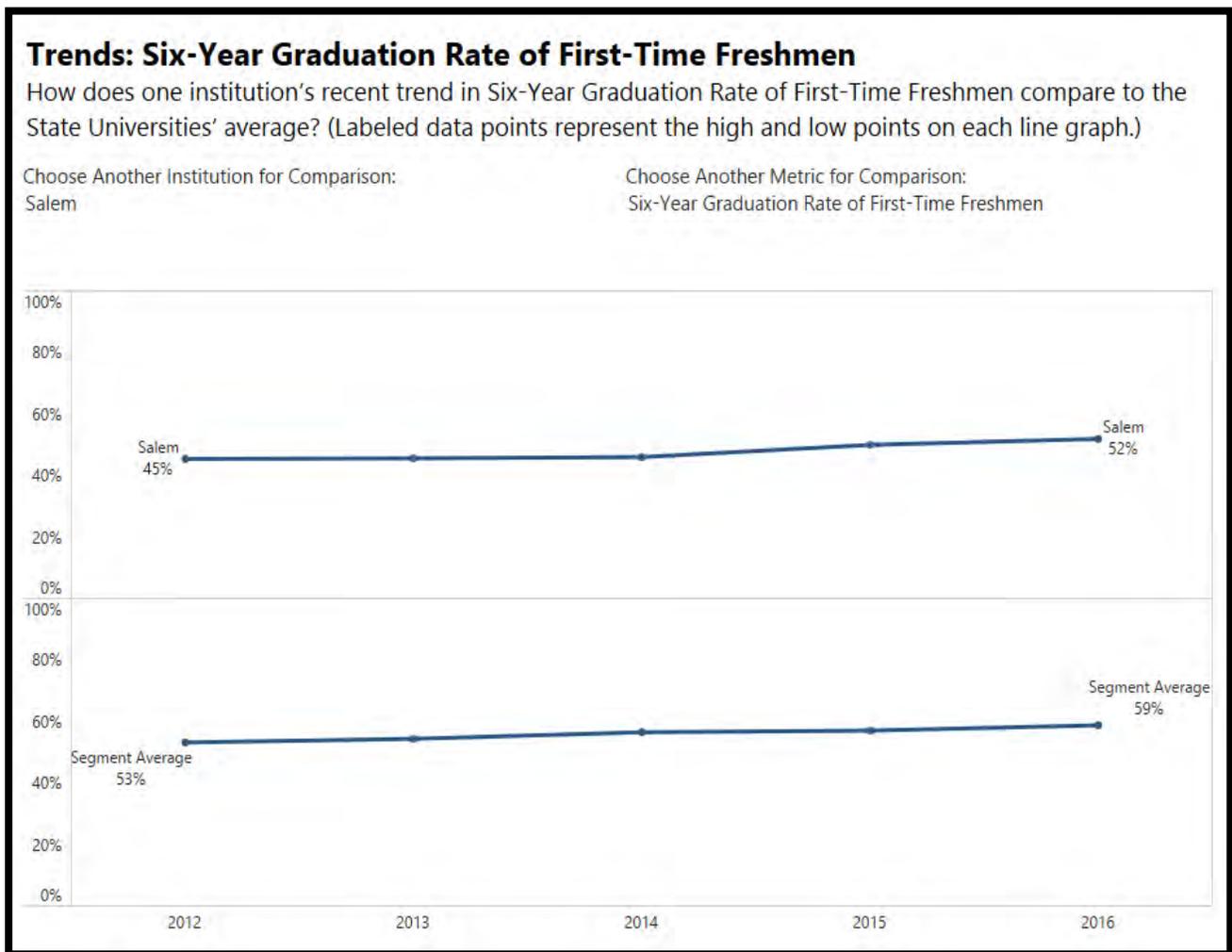
Graduation rates for first-time, full-time freshman and transfer students are at a six-year rate (six years from date of entry). We do continue to see progress in this area with the graduation rate for the class that entered in the fall of 2011 at 52%. Our next goal for 2021 is a 62 percent graduation rate for the class that entered in the fall of 2015 (see Table V and Graphs V and VI).

Increased outreach to community colleges by the Admissions Office, including the creation of a new Executive Director for Partnership Development and Outreach, have helped provide a more successful transfer experience for students to Salem State. As a result, we are working with students earlier in the process and assisting them with degree mapping while they are still at the community college, which has resulted in a much smoother transition to SSU, as well as keeping them on track to

graduate. In addition, the university's active involvement in statewide efforts to increase the portability of courses and maximize the transfer of credits also supports transfer student completion. Graduation rates have also been buoyed by targeted outreach from Financial Aid, Registrar and Academic Advising to students who are close to graduating in order to motivate them to complete or to assist them in crossing the finish line.

Table V: 6 Years Graduation Rate - Salem State University

Fall Term	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
6 Years Graduation Rate - Full Time Freshman	45.90%	49.90%	51.52%	52.07%
6 Years Graduation Rate - Full Time Transfer	64.26%	67.46%	63.76%	63.02%



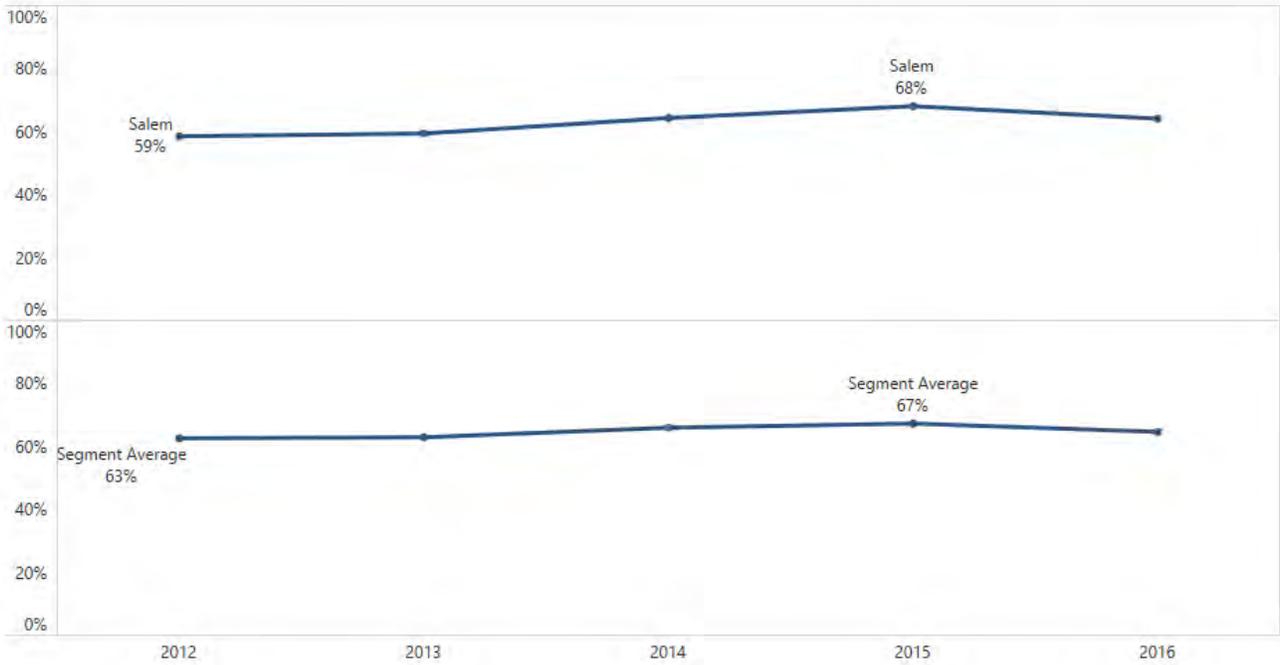
Graph V

Trends: Six-Year Graduation Rate of Transfer Students

How does one institution's recent trend in Six-Year Graduation Rate of Transfer Students compare to the State Universities' average? (Labeled data points represent the high and low points on each line graph.)

Choose Another Institution for Comparison:
Salem

Choose Another Metric for Comparison:
Six-Year Graduation Rate of Transfer Students



Graph VI

c. Healthcare & STEM

The demand for majors that require laboratory courses far exceeds current facilities. Salem State routinely caps nursing and biology majors due to the limits of available lab space. Over 83% of students who apply for the nursing program are not accepted. For the past few years, we have closed admission to biology in April due to capacity challenges and we increased the GPA requirement, which limits access to this major for students in our region. Salem State has also seen an increase in the demand for the healthcare studies major, while not yet offering a clinical component due to the university lacking sufficient lab space. Frankly, Salem State could grow this major even more if the facilities to support the growth were available. In addition, the necessity for support courses in other majors with lab requirements, as well as for general education courses in the sciences, demonstrates the urgent need to increase lab capacity. It is not possible to quantify how many students may be turned away due to the limits of current facilities; however, increasing both the quantity and the caliber of university labs will pay dividends in maximizing undergraduate access, retention, and graduation (Table VI).

Table VI: Healthcare & STEM vs. Other Fields

	2015	2106	2017
Salem			
Health Care	13%	11%	11%
STEM	6%	8%	9%
Other Fields	81%	81%	80%
Bridgewater			
Health Care	2%	1%	2%
STEM	8%	9%	8%
Other Fields	90%	90%	90%
Fitchburg			
Health Care	9%	10%	9%
STEM	13%	13%	17%
Other Fields	78%	77%	74%
Framingham			
Health Care	8%	6%	8%
STEM	12%	13%	15%
Other Fields	80%	81%	77%

Mass Maritime			
Health Care	0%	0%	0%
STEM	71%	76%	81%
Other Fields	29%	24%	19%
Mass Art			
Health Care	0%	0%	0%
STEM	0%	0%	0%
Other Fields	100%	100%	100%
MCLA			
Health Care	2%	1%	1%
STEM	14%	22%	13%
Other Fields	84%	77%	86%
Westfield			
Health Care	2%	3%	3%
STEM	8%	10%	9%
Other Fields	90%	87%	88%
Worcester			
Health Care	24%	26%	24%
STEM	13%	11%	13%
Other Fields	63%	63%	63%

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
a. Faculty and Staff	Increase the percentage of full-time faculty/staff of color to 35% across all departments by 2019.	Assess intentional recruitment efforts and create support systems for the aforementioned recruited faculty and staff. Field candidates who have experience with working students from marginalized communities	Human Resources	Update university on the following dates: February 15th 2018 September 15th 2018 January 15th 2019	Staff of color increased from 18.2% to 19.7% (Fall 2016-Fall 2017) and faculty increased from 18.5% to 21.1% during the same period.
b. University Police	Increase staff of color within the University Police Department. Mandatory implicit bias training on race, gender and sexuality.	Assess recruitment efforts and update the university community. Ensure training on cultural competency is provided to University Police staff.	Gene Labonte University Police	Offered in the Summer 2018	In June 2018, the Anti-Defamation League/United States Holocaust Memorial Museum will conduct Anti-Bias and Diversity Training for SSU Police.
c. The Office of Institutional Diversity & Equity (OIDE)	Create institutional policies to address systemic inequalities, bias incidents, and campus climate at Salem State University.	Establish the inaugural Office of Institutional Diversity & Equity ran by the Chief Diversity Officer. Discontinue the use of "Inclusive Excellence" (OIE) Brand	President Keenan	Replace OIE with OIDE by February 26th	A Bias Response Team was established by President Keenan in April 2018. The purpose of the team is to evaluate, address, and recommend proactive measures that will assist us in understanding and eliminating institutional cultural

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
					<p>norms that allow bias incidents to occur within our community.</p> <p>The Climate Study Implementation Team was established in November 2017 to review the Campus Study results and propose policies and initiatives to improve campus climate.</p>
d. Vice President (VP) and Chief Diversity Officer (CDO)	Appointment of a VP and CDO	Hire an individual as VP/CDO to run The OIDE with adequate full time administrators and support staff to address institutional concerns.	President Keenan Chair of Search Committee appointed by President Keenan	Full time CDO position filled by Fall 2018	One year interim appointment named, effective June 3, 2018 (R. Comage)
e. CDO Hiring Process	BBP Representation in the hiring process for CDO.	Two (2) Black, Brown, and Proud (BBP) Representatives on the search committee.	Chair of Search Committee appointed by President Keenan	Begin the processes February 15th 2018	N. Bryant will lead the search committee for the new VP/CDIO. There will be BBP representation on the committee.
f. Ensure Accountability to Students	Monthly meetings between BBP and University Leadership	Schedule a two hour meeting per month with University Leadership, BBP.	President Keenan's Office	February: One (1) March: Two (2) April: One (1)	BBP/University Leadership meetings were held in

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
				May: N/A	February and April 2018.
g. Diversity Power Dynamics and Social Justice General Education Requirement	Ensure courses apart of the Diversity Power Dynamics and Social Justice core curriculum are taught by qualified professors.	BBP involvement in committee review process of classes applying to the core curriculum.	Provost Silva Keja Valens (Faculty Curriculum Committee Rep.)	Effective Immediately Spring 2018	18 new courses have been approved for the coming academic year (AY18-19); another 15 courses are in the faculty governance approval process for future implementation. See attached list.
h. Equity Review Process	Include questions regarding experience working with students of color within higher education.	Periodically publish outcomes of the Equity Review Process to the campus community	Scott James Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	Effective Immediately Spring 2018	Equity reviews have been implemented at key stages of searches to ensure appropriate diversity representation. This has provided opportunities for HR and the Inclusive Excellence Office to share best practices and other tools and resources to help committees and hiring managers attract candidates from diverse backgrounds.

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
i. Students of Color Learning Community (LC)	Develop a Women of Color LC, Men of Color LC, and Asian LC to aid in the academic support & retention of students of color.	Establish & sustain a Women of Color LC, Men of Color LC , and Asian LC offered at the beginning of every academic year to incoming Freshman Implement requirements to link LC to BEES/Brotherhood.	First Year Experience Mathew Chetnik	Offer to Fall 2018 Freshman class during Summer 2018 Orientation	FY Learning Communities will be offered to Women of Color and to Men of Color in AY 18-19.
j. Honors Program	Increase amount of students of color in the honors program.	Review and amend efforts to recruit students of color to the honors program.	David Silva Lee Brossoit Scott Nowka	Planning to being Spring 2018 for rollout beginning Summer/Fall 2018	An increase is expected in AY18-19. See attached document for details.
k. Training	Faculty be provided training opportunities designed to increase individual cultural competency.	Encourage faculty to attend university sponsored training by providing them "Service to Community" credit.	David Silva	In Spring 2018 provide BBP documentation of training opportunities provided to faculty/staff	Inclusive Excellence Ambassadors being launched in Summer 2018. In addition, Academic Affairs, in conjunction with faculty leaders and the Inclusive Excellence Office, has set up a two-day diversity and inclusion training for faculty for May 23 and 24, 2018.

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
					<p>Additional trainings include:</p> <ul style="list-style-type: none"> • The Power of Respectful Language (1,068 employees totaling 168.4 hours as of 5/4/18) • Uncovering Implicit Bias (1,034 employees totaling 288.6 hours as of 5/4/18) • Culture Coaching: The Power to Transform Leaders and Institutional Climate (February 2018) • Black Student Success on Your Campus: Increase Recruitment, Retention, Engagement, & Completion (February 2018; a DVD is available for sign-out) • Sharing Stories: Fostering Empathy (April 2018, Navigator Center staff of 50 employees)

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
l. Workshops	Members of the campus provide workshops in the area of diversity, racial equity, and social justice.	Bi-annual workshops on diversity for faculty, staff and administration and encourage attendance. Supporting and providing.	Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	In Fall 2018 provide BBP a list of workshops	See Category K for May Professional Development training details.
m. Bias Response Protocol	Develop and refine a Bias Response Protocol in the website.	Form a Bias Response Team comprised of students, faculty, and staff to assess and efficiently respond to on-campus bias incidents.	Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	By end of Spring 2018 Begin revised Bias Response Protocol/Team	Bias Response Working Group has developed a workflow, and Pres. Keenan has charged the Bias Response Team which will oversee this work.
n. Scholarships for Students of Color	Raise university scholarship funds that will benefit students of color.	Create and advertise scholarship opportunities for incoming students of color.	Cynthia McGurren & The Office of Institutional Diversity & Equity	Effective Immediately Spring 2018	The President's Diversity Scholarship was established in January 2018, made possible through fundraising in honor of President Keenan's inauguration and the MOST Scholarship; \$5,270 in funds will be awarded in FY19. There are also two one-time awards available for next

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
					<p>academic year: one for a male student of color and one for Latino student/s.</p> <p>A five-figure funding proposal to support the Brotherhood and Bees has been submitted to a private foundation and we are awaiting a response.</p>
o. Budget Review	Increase the retention rate of students of color through reallocation of resources within the university.	Assess the budget of departments that focus on students of color (CAE, Student Advocacy, and Diversity and Multicultural Affairs Office).	President's Executive Council	By the end of Spring 2018, provide BBP with assessment summary	FY19 budget still under review.
p. Student Success Initiatives	Provided increased funding for Diversity and Multicultural Affairs office.	Provide BEES and Brotherhood adequate budget for programs involving student retention.	President's Executive Council	By the end of Spring 2018, provide BBP with assessment summary	FY19 budget still under review.
q. Orientation	Intensive dialogue on Diversity, power dynamics and equity during Summer Orientations.	Mandatory diversity session(s) with the goal of increasing cultural competency.	Carla Panzella Lauren Hubacheck	In the second meeting of Spring 2018, provide BBP with Orientation plans for 2018	Programming expected as part of 2018 orientation.

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
r. Space Allocation	Larger location for the Center of Diversity and Cultural Enrichment.	Provide BPP tentative architectural design of future center space within Ellison Campus Center Building.	Carla Panzella Rebecca Comage	Spring 2018 provide BBP with floor plans Begin implementation design implementation Summer 2018	Larger space has been identified.
s. Culturally Engaging Campus Environment	In applying the CECE model, increase full time staff within the Diversity and Multicultural Affairs (DMA) office.	Hire two full time Administrators in DMA. One as the Racial Equity Program Coordinator (PC), the other as the Gender and Sexuality PC.	Rebecca Comage	Spring 2018 behind hiring process. Fill the two full time positions by Summer 2018	DMA transitioned to LEAD with restructured staffing of additional Associate Director and Program Coordinator (subject to funding).
t. Counseling within Diversity and Multicultural Affairs (DMA)	Provide DMA office a full time counselor able to assist their success.	Hire a full time Multicultural Counseling Specialist dedicated to students of color within the center.	Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	Spring 2018 behind hiring process. Fill the full time position by Summer 2018	Under review.

General Education: Diversity, Power Dynamics, and Social Justice Courses

Item #	Description	Type of Action	Date Received	Sent to Committee	Approved	AUC Approved	Sent to Pres/Provost	Approved by Pres/Provost	Effective Date
18:021	SOC240-Contemporary Social Problems	Change in Course-DPDS	6/28/2017	Curriculum	CC17/18:06	17/18:04	1/31/2018	2/10/2018	FALL2018
18:022	SOC345-Race and Ethnicity in Society	Change in Course-DPDS	6/28/2017	Curriculum	CC17/18:06	17/18:04	1/31/2018	2/10/2018	FALL2018
18:033	ENL253-American Ethnic Literatures Since WWII	Change in Course-DPDS	9/11/2017	Curriculum	CC17/18:05	17/18:03	12/18/2017	1/9/2018	FALL2018
18:034	ENL352-U.S. Latino/a Literature	Change in Course-DPDS	9/11/2017	Curriculum	CC17/18:05	17/18:03	12/18/2017	1/9/2018	FALL2018
18:040	POL303-Grassroots Politics	Change in Course-DPDS	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:041	POL309-Introduction to Feminist Theory	Change in Course-DPDS, W-II	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:042	POL327-Race in American Politics	Change in Course-DPDS	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:043	POL328-Immigration and US Politics	Change in Course-DPDS	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:049	THE101-Introduction to Theatre Arts	Change in Course-DPDS	9/29/2017	Curriculum					
18:050	IDS232-American Identities	Change in Course-DPDS	9/29/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	FALL2019
18:079	SWK270-Understanding Diversity and Cultural Competence in Human Services	Change in Course-DPDS	10/5/2017	Curriculum					
18:086	MCO230-Media and Race	New Course-DPDS	10/10/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:087	COM274-Gender, Media, and Communication	Change in Course-DPDS	10/10/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:089	COM304-Mass Media and Society	Change in Course-DPDS	10/10/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:124	DAN330-Hip Hop Dance History	New Course-DPDS	10/12/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	FALL2018
18:125	DAN320-Modern Dance History	New Course-DPDS	10/12/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	FALL2018
18:127	DAN100-Introduction to Dance	Change in Course-DPDS	10/12/2017	Curriculum	WITHDRAWN	-----	-----	-----	-----
18:147	SPN382-Latinx Immigration: Context and Representation	Change in Course-DPDS	10/14/2017	Curriculum					
18:148	SPN420-US Latino Literature in Spanish	Change in Course-DPDS	10/14/2017	Curriculum					
18:155	BHS201-Health Disparities in the U.S. in the 21st Century	New Course-CS, DPDS	10/15/2017	Curriculum					
18:162	ENL354-Native American Literature	Change in Course-DPDS	10/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:163	ENL255-African American Literature I	Change in Course-DPDS	10/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:164	ENL256-African American Literature II	Change in Course-DPDS	10/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:165	OCT407N-OT Analysis & Intervention I	Change in Course-DPDS	10/16/2017	Curriculum					
18:180	GPH379-Environmental Justice	Change in Course-DPDS	10/16/2017	Curriculum					
18:190	PSY333-Psychology of Gender	Change in Course-DPDS	10/30/2017	Curriculum					
18:191	PSY344-Topics in Social and Cultural Diversity	Change in Course-DPDS	10/30/2017	Curriculum					
18:192	PSY355-African American Psychology	Change in Course-DPDS	10/30/2017	Curriculum					
18:210	ENL290-Fictions of Gender and Sexuality	New Course-DPDS	11/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:214	CRJ360-Racial Minorities, Crime, and Criminal Justice	Change in Course-DPDS	12/1/2017	Curriculum					
18:215	CRJ240-Bias Crime	Change in Course-DPDS	12/1/2017	Curriculum					
18:216	CRJ365- Gender & the Criminal Justice System	Change in Course-DPDS	12/1/2017	Curriculum					
18:235	IDS385-Community Organizing	Change in Course-DPDS	2/20/2018	Curriculum					
18:242	THE101-Introduction to Theatre Arts	Change in Course-DPDS	2/27/2018	Curriculum					



Commonwealth Honors Program (CHP)
at Salem State University
 (as of April 26, 2018)

CHP Admissions Data, Spring 2018 → Class of 2022

Self-ID Category	Admitted		Deposited	
	N	%	N	%
Asian	35	11%	4	10%
Black/African-American	28	9%	1	3%
Capeverdean	2	1%	0	0%
Hispanic	36	11%	4	10%
None chosen	7	2%	0	0%
Two or more	12	4%	0	0%
White	204	63%	31	78%
Total	324	100%	40	100%

Final figures are pending:

1. *final orientation (August)*
2. *confirmed enrollment by each student in at least one honors section (September)*

Winter/Spring 2018 Outreach (to current first-year students) -- completed

Provost Postcard: to all SSU first-year students with F17 qualifying GPA
 Follow-up E-mail: to students of color who received the postcard
 Informational Breakfast: to students of color who received the follow-up e-mail
 Result: Six (6) new students of color to enter the CHP F18 (as sophomores)

Planned Outreach (for AY18-19)

- NEW: Change in CHP scholarship program: broader coverage
- NEW: Targeted outreach of students of color during fall '18 for entrance to the CHP in spring '19 – continued consultation with Professor S. Oliver
- REPEAT: Postcard + E-mail + breakfast sequence in January 2019 (eligibility based on fall '18 grades)
- NEW: Outreach to advisees of qualified students of color so that advisors can encourage advisees

SUBJECT: Executive Committee Meeting Report of May 23, 2018

The Executive Committee of the Board of Trustees met Wednesday, May 23, 2018, in Marsh Hall, room 210, located on the Central Campus of Salem State University.

Present for the Committee were Trustees Mattera (chair), Lutts, Scott (phone), Chisholm, President Keenan (Committee Liaison); Secretary to the Board Montague and Assistant Secretary Sadowski.

*In accordance with the Open Meeting Law all votes taken during this meeting, in which a member participated remotely, were by roll call vote.

Chair Mattera called the meeting to order at 6:55 pm and announced that due to the late hour the committee would table the committee schedule discussion (agenda item III) to the June 6th Board meeting.

Chair Mattera brought forth the first matter for review which was the Presidential Review Committee's Report (Attachment "A") and commended Trustee Lutts who chaired the committee and Trustees Chisholm, and DeSimone for their work on the report.

Upon a motion duly made by Trustee Lutts and seconded by Trustee Scott, and by roll call vote it was unanimously

VOTED: The Executive Committee of the Board of Trustees of Salem State University hereby accepts and approves the annual review of John D. Keenan for 2017-2018 as presented by the Presidential Review Committee to be submitted to the Board of Higher Education.

Voting in the affirmative: Chisholm, Lutts, Scott, Mattera (chair)

Voting in the negative: None

Absent: None

Chair Mattera moved to the next agenda item which was a discussion of Trustee Emeritus nominations. There was a brief discussion regarding the nomination and acceptance process and Chair Mattera announced that he would accept nominations for Trustee Emeritus. Trustee Chisholm offered a nomination for Jacob Segal which Chair Mattera accepted. Trustee Chisholm then made the following motion which was seconded by Trustee Lutts, and by roll call vote it was unanimously

VOTED: The Executive Committee nominates Jacob Segal as Trustee Emeritus and recommends that the Board of Trustee confirm the nomination.

Voting in the affirmative: Chisholm, Lutts, Scott, Mattera (chair)

Voting in the negative: None

Absent: None

There being no further business to come before the committee and upon a motion duly made by Trustee Chisholm and seconded by Trustee Lutts, it was unanimously

VOTED: To adjourn the meeting at 7:05 pm

Prepared by: L. Montague, Secretary to the Board of Trustees

2017-2018 Executive Summary

Presidential Review: Salem State University, President John D. Keenan

Presidential Review Committee

Robert Lutts, chair

Teresa Chisholm, trustee

Mary DeSimone, trustee

I. The Review Process

The 2017-2018 annual review process began with a charge from the board chair to the Presidential Review Committee to produce a report to be considered for a vote by the board at its regular meeting on June 6, 2018. The Presidential Review Committee established the criteria for review, clarified the protocol for completion of the review, and determined the timeline of meetings required in order to submit the review by the deadline of June 30, 2018. While the Department of Higher Education guidelines on presidential evaluations do not require a formal evaluation of a president who has been in office for less than one full year, the board of trustees agreed to conduct a post-transition assessment of President Keenan's eight months in the position to review his progress to date.

The committee examined the president's performance in two broad areas: the specific goals set forth by Salem State University and the performance of the university against system-wide goals. In addition to focusing on the "Big Three" Statewide Priority Objectives, the system-wide goal evaluation looked at campus safety and violence prevention and increasing diversity in leadership positions. The assessment of John D. Keenan's Presidential Initial Review and the analysis of relevant data has demonstrated a strong and effective transition period over the past eight months. The report highlights an excellent understanding of the challenges the university faces over the coming years. President Keenan's report demonstrates a keen understanding of the goals of both the Board of Higher Education and the goals set by the board of trustees at Salem State University.

II. The Performance Data to Support Conclusions and Recommendations

Performance data are embedded within each section of this document. Additional supporting materials are listed in Section V. Individual documents are attached to John D. Keenan's Presidential Initial Review 2017-2018.

III. Summary Statement

The board of trustees recognizes that President Keenan has completed a thorough self-evaluation focused on his transition to the position of president and the specific goals for this year. The Presidential Review Committee is impressed with the depth of understanding that President Keenan has demonstrated of the challenges the university is facing. Declining enrollments, expanding expenses for faculty, and overhead benefits costs are creating a difficult financial environment. President Keenan presents this situation very clearly in a graph of enrollment and total faculty and staff expenses in his summary report (page 13, John D. Keenan's Presidential Initial Review 2017-2018). Another example of President Keenan's understanding of the significance of these issues was his announcement on May 8, 2018, that

the university would implement a hiring freeze to prompt a financial adjustment as a result of softer than projected enrollment numbers for AY 2018-2019. The committee appreciates in these challenging times of declining demographics the president's prudent pause to be intentional in the allocation of restrained resources. The committee understands that eight months is far too short a period of time to provide an in depth assessment of performance in the position. Nevertheless, the committee is certain that President Keenan is off to a strong start. He has made a few key staff changes and succeeded in retaining all major leadership positions in the first six months. He has conducted a number of introductory meetings with faculty and has used these meetings as an opportunity to communicate the challenges and opportunities that the university is facing.

We are hopeful that this open communication approach is effective at gaining buy-in for the strategies President Keenan is implementing. We are confident that President Keenan is setting the groundwork for a strong working relationship with the faculty and staff of the university. We believe President Keenan is presenting a clear set of goals and is pursuing a collaborative effort to engage faculty and staff.

A. Institutional Goals

AY 2017-2018 Goals and Priorities

- Completing Strategic Plan (2017-2021) and gaining approval by the Board of Higher Education
- Preparing and presenting proposal for the Science Teaching Laboratory Addition (STLA) to Baker Administration
- Completing Campus Climate Survey and rolling out results to campus community
- Transitioning into presidential role

President Keenan has successfully completed his AY 2017-2018 goals and has set clear and measurable goals for the upcoming AY 2018-2019. These priorities are itemized below. We have seen many programs and initiatives launched with the objective of helping achieve these goals. We believe these goals are aligned with the system-wide priority objectives set forth by the Board of Higher Education.

We have been impressed with President Keenan's approach to utilizing the information obtained from the Campus Climate Survey to demonstrate areas of concern and use this information to help create a positive and inclusive environment throughout the university. Culture is created at the top. President Keenan and his staff are setting a good example for the university to follow. A healthy culture of inclusion is a goal that is highly valued by President Keenan and his staff.

AY2018-2019 Goals and Priorities

- Increase enrollment +100 students
- Obtain funding for STLA
- Initiate/plan new comprehensive fundraising campaign
- Increase additional auxiliary revenues (summer housing)
- Gain approval of Occupational Therapy Doctorate (clinical)
- Gain approval of our BS in IT
- Evaluate "online" initiatives/collaborations

- Seek “control” of strategic Canal Street properties
- Hire a new permanent VP for Diversity and Inclusion
- Build on our concerted efforts to increase faculty of color
- Continue making positive gains toward closing achievement gaps
- Draft Cat Cove business plan and evaluate private collaborations.

B. System-Level Goals

Salem State University continues to be guided by the tenets and the goals set forth by the Board of Higher Education. The following details highlight data points in each of the “Big Three” Statewide Priority Objectives:

Access – President Keenan is developing a plan to enhance the community college channel to the university. He is developing specific programs to grow and expand access to the university. President Keenan is working closely with the Black, Brown, and Proud group and the Student Government Association to insure the university is encouraging proper communication to foster greater student access with all groups in the university.

Closing Achievement Gaps - The near term goals and longer term goals clearly are aimed at enhancing the success of students all across the university. This should be a strong step toward closing achievement gaps.

College Completion/Success – Over the past decade the university has improved substantially the time period in which students graduate and the graduation completion rates. President Keenan is aiming to continue to improve on these statistics. We do recognize that completion statistics can be at odds with the goal of improving access. If we grow the number of students attending our programs, we may be expanding into a group of students that may take longer to graduate. This may mean some of these goals may be in conflict with each other (access versus completion). We believe President Keenan is well aware of these issues and will do what is best for all students at our institution.

C. Campus Safety and Violence Prevention

President Keenan has worked closely with Assistant Vice President for Public Safety and Risk Management Gene Labonte and Vice President for Finance and Facilities Karen House to place a high priority on safety throughout the university. The campus has successfully implemented the Department of Higher Education’s best practices for campus safety and violence prevention through online and in person trainings. In addition, the university has an active Care and Concern Team, Prevention Task Force, and Prevention Education Advocacy Response (PEAR) program; launched a Bias Response Team; reviewed its emergency preparedness and expressive activities policies; and launched the Rave Guardian mobile application with the campus community this academic year. The board is confident that the university is addressing campus safety and violence prevention.

The results of the Campus Climate Survey (conducted in Spring 2017) were presented to the campus in early November. The report was extremely useful in identifying the needs on campus and issues that must be addressed. President Keenan appointed a Climate Survey

Implementation Team (CSIT) and charged them with reviewing the data and working with the university community to implement strategies that improve the campus climate. We were pleased that President Keenan involved the board in the roll-out of survey results. This initiative remains a priority for his administration as well as for the board of trustees.

D. Increasing Diversity in Leadership Positions

President Keenan has made key appointments to his leadership team that demonstrate a commitment to diversity in administrative management. With the departure of the inaugural vice president for inclusive excellence in the fall, President Keenan appointed interim co-chief diversity and inclusion officers to complete the current academic year. They have done an excellent job of stewarding this office during a period of transition. One of these individuals has been appointed for the next academic year and the university is actively working toward recruitment of a permanent vice president.

One emerging trend from the Campus Climate Survey results was a need to increase hiring and retention of faculty and staff from culturally diverse backgrounds. To address this matter, the CSIT is planning to draft a five-year plan to increase diverse faculty and staff on campus. The Human Resources and the Inclusive Excellence offices now conduct equity reviews for all employment searches and this year offered several professional development and training opportunities focused on cultural competency, diversity, and inclusion.

IV. Recommendation for Compensation Adjustment

The Department of Higher Education advises that newly appointed presidents are not eligible for compensation adjustments during their first year status. As such, the board will not make a recommendation for a compensation adjustment as part of the 2017-2018 review process.

V. Supporting materials: charts, graphs, and/or data

John D. Keenan's Presidential Initial Review 2017-2018 and Appendices

- A. Presidential Leadership Profile
- B. Inauguration Address of John D. Keenan
- C. Assessment of Campus Climate Executive Summary
- D. Strategic Plan
- E. Science Teaching Laboratory Addition

John D. Keenan's Presidential Review Addendum

Black, Brown, and Proud Update



John David Keenan, JD

Presidential Initial Review

August 6, 2017 – April 15, 2018

April 15, 2018

TABLE OF CONTENTS



Introduction	2
Top Priorities for the First Year	4
Campus Climate Results	4
Strategic Plan Approval	4
Science Teaching Lab Addition (STLA)	6
Board of Higher Education Priorities – Progress on the Big Three	6
Access	6
Closing Achievement Gaps	8
Completion/Success	9
Progress on Our Strategic Plan	12
Conclusion & AY 2018-2019 Goals and Priorities	22
Exhibits	
President Leadership Profile	A
Inauguration Address of John D. Keenan	B
Assessment of Campus Climate Executive Summary	C
Strategic Plan	D
Science Teaching Laboratory Addition	E

INTRODUCTION

While the Department of Higher Education does not require a presidential review during the first year a president takes office, I fully agree with the Board of Trustees (BOT) that it makes sense to review my initial performance and, more importantly, set goals for AY2018-2019. At the February 7, 2018, BOT meeting, Chair Paul Mattera appointed Trustees Rob Lutts, Teresa Chisholm and Midge DeSimone as the Presidential Review Committee (PRC).

Transition to the Presidency:

With my confirmation as candidate on June 20, 2017 (BHE vote), I was extremely fortunate to have extensive overlap with outgoing President Pat Meservey (see attached Exhibit A, Presidential Leadership Profile). President Meservey and I met regularly for the several weeks prior to her retirement on August 5, 2017. President Meservey transferred all outstanding matters relative to the administration of the office. I was honored to be able to formally introduce my vision for Salem State to the campus, local, and regional community at my inauguration on January 19, 2018 (see attached Exhibit B, Inaugural Address).

Transfer of relationships:

With this presidential transition coming on the heels of an extremely successful comprehensive campaign, it was critically important to make sure the “handing off” of relationships with key stakeholders was seamless. We spent most of the summer and the early fall engaging with the campus community, community college leaders, civic leaders/elected officials, donors, business and community partners, and peers in higher education. Campus community conversations included one-on-one meetings with members of the Board of Trustees, a listening tour with faculty from each school, meetings with union leadership, the Student Government Association and more. In addition to in-person meetings, former President Meservey, Institutional Advancement Vice President Cynthia McGurren, Institutional Advancement AVP Cheryl Crouse, and I thoroughly reviewed all active supporters and identified potential future donors as well. I am confident these transitional conversations went well. Indeed, I believe this relationship building aspect of the position is one of my greatest strengths. It is truly a pleasure to meet and work with such passionate supporters of Salem State.

Building the team:

As I've said many times, I was extremely fortunate to inherit from President Meservey an exceedingly strong and talented senior team. As an internal candidate, I had the good fortune of working with all members on the senior team through the President's Executive Council (PEC). I had been completely transparent with my peers regarding my intent to seek the presidency. Once I was selected and confirmed as President, I had individual meetings with each member of the PEC to ascertain their plans. Here again, I am proud to report not a single member of the senior team decided to leave because of the transition. Chief of Staff Beth Bower advised me of her desire to retire; however, she was agreeable to stay on for a few extra months to assist with my transition. Thankfully, President Meservey's internal team, Adria Leach, Katie Sadowski, Lynne Montague, Nicole Giambusso, and Kim Burnett also remained.

Without hesitation, I knew who could fill the role of my new Chief of Staff. Nate Bryant, alumnus, had proven himself an asset to Salem State time and time again over the course of his more than two decades of service. Through many different roles (admissions and advising) and in leading both the Strategic Planning Committee and 10,000 Reasons Campaign (on campus), Nate had the respect of the entire campus. Moreover, as a resident of Salem and former school committee member, he had the local contacts and instincts to assist with "town – gown" relations.

With Nate in place, I quickly reaffirmed the other PEC members' commitments to stay in place. Appreciating the value of having a general counsel on campus, I also decided to fill the vacancy I had left. Through a competitive search process lead by Nate, we were fortunate to recruit an experienced public higher education attorney. Rita Colucci joined us in December after having served at Framingham State University for over a decade in many capacities including Director of Human Resources, Chief of Staff to the President, and General Counsel.¹ I promoted Scott James to Executive Vice President and assigned him the additional responsibilities of Human Resources and Information Technology. I also re-united Facilities with Finance under Chief Financial Officer Karen House. With the full team in place, we were ready to go!

¹ I think it is also important to note that I was fully transparent with FSU President Javier Cevallos and worked out a smooth transition so that he was not left without counsel.

Top Priorities for the first year

Having been a member of the PEC since 2014, I was aware of the priorities for my first few months in office: completing the **Strategic Plan** (2017-2021) and gaining Board of Higher Education (BHE) approval; preparing and presenting our proposal for the new **Science Teaching Lab Addition (STLA)** to the Baker Administration; and completing our **Campus Climate Survey** and rolling out the results to campus. We restructured Beth Bower's position to take the lead on completing the Strategic Plan and finalizing our STLA proposal. Beth was also assigned to assist former Vice President for Diversity and Inclusion, Lisa McBride with rolling out the campus climate survey results.

a. Campus Climate Results

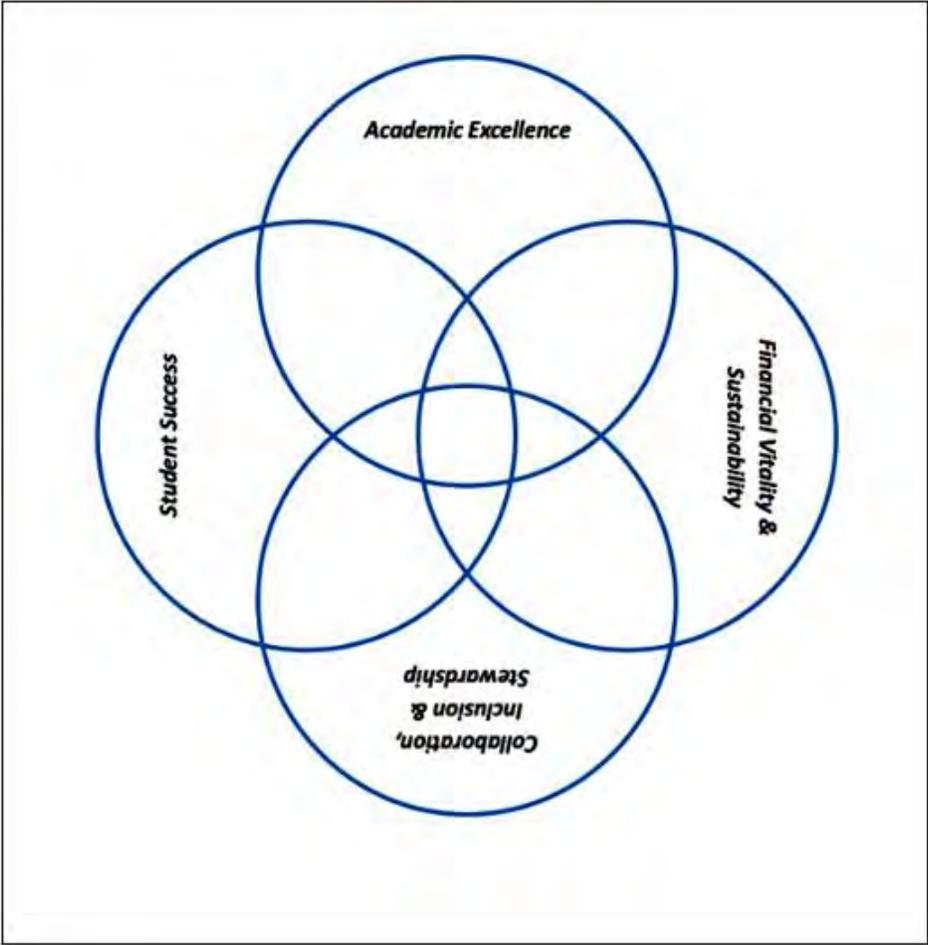
In November, we invited Dr. Susan Rankin to campus to help present the findings from our Campus Climate Survey, through a series of discussions with the campus community (see attached Exhibit C, Executive Summary). VP McBride assisted with this roll out and departed shortly thereafter. With VP McBride's departure, we filled the role with interim co-chairs Rebecca Comage and Professor Michael Mobley. They have assisted with the smooth transition and have helped me address some of the data driven change efforts recommended by Dr. Rankin including, enhancing the cultural competency for student faculty and staff and assessing the long-term role of the office.

b. Strategic Plan Approval

At the December 5, 2017, Strategic Planning Subcommittee of the BHE, I successfully presented and defended our proposed Strategic Plan, which was unanimously approved and recommended to the full BHE (see attached Exhibit D, Strategic Plan). On December 12, 2017, the full BHE also unanimously approved the plan. Provost Silva, Chief of Staff Bryant, and I also met with Secretary Peyser, Commissioner Santiago, and Tom Moreau to discuss implementation and assessment of the plan. While it has been suggested that Secretary Peyser has final sign-off authority on the plan, we feel that it is important to proceed as approved. We are working with our Collaboration Committee on both implementation and monitoring of our progress.

The Collaboration Committee, an advisory committee of administrators and faculty, was convened in 2016 to facilitate an inclusive process for collecting the campus community ideas and recommendations and distilling them into a four-year plan. The Committee led an intense and inclusive outreach process to ensure key stakeholders would have multiple opportunities to provide input to assure a shared vision and goals. During the fall of 2016, the SSU community participated in well over 2,000 touchpoints and engagement opportunities.

Dean Cambone (School of Education) recently described our strategic plan goals as inextricably linked – each being equally reliant on the other for success. I believe his Venn Diagram (below) simply and exquisitely displays our inherently related tasks. Ideally, four years hence, we will be able to report “mission accomplished” on all fronts.



c. Science Teaching Lab Addition (STLA)

In December, we finalized our proposal for the STLA and submitted the requisite supporting application and materials (see attached Exhibit E, STLA Summary). Prior to submission, I participated in our peer review presentation, which enabled us to improve our proposal in accordance with the new framework and guidelines. In recently speaking with Division of Capital Asset Management and Maintenance Commissioner Carol Gladstone, it is my understanding that their recommendation(s) have been forwarded to Administration and Finance for review. Presently, we are in full court press advocacy mode. Our North Shore Legislative Delegation has sent a letter of support to Governor Baker and Secretaries Peysner, Ash, and Heffernan. Senator Lovely and Representative Tucker are also arranging meetings with Governor Baker and Secretary Heffernan.

Progress on the DHE Big Three

a. Access

Salem State is committed to advancing access to college and addressing the cost problem in higher education. We have enthusiastically collaborated on Department of Higher Education access initiatives including: Transfer Pathways; STEM Policy; State University Transfer Principles; Commonwealth Commitment; Mass Colleges Online; and Dual Enrollment. Our collaboration with the community colleges has increased as Admissions visited community colleges more for transfer advising. We have established an Early College initiative with Salem High School and are in preliminary talks to extend the program to Lynn Public Schools. We have implemented financial literacy programs, enhanced financial aid messaging, and created a financial aid restructuring formula intended to better meet the needs of our low-income students. We have marketed the value and affordability of a Salem State education. Value and affordability are consistent themes emphasized in Admissions communications, marketing materials, and events. The quality and value of a Salem State education is demonstrated to prospective students and families through interactions with accessible, engaged faculty; learning about high quality internship and post-graduate job opportunities. Through comparing the costs of out

of pocket expenses, loans, and post-graduate debt with other institutions, students learn about the value and affordability of attending Salem State. Further, we have streamlined the transfer credit equivalency process and held early transfer registrations. We have been active in statewide recruitment events and providing Book Awards at our feeder high schools to promote access. Admissions created the Executive Director of Partnership Development and Outreach position to strengthen pathways from community colleges, community based organizations and high schools to Salem State.

We continued to expand flexible program options to better accommodate adult learners, including a fully online, ADA compliant graduate certificate in business that will launch in fall 2018.

We offered an innovative BS + Educator Licensure + MEd pathway program that is dramatically less expensive than traditional models and provides students with the opportunity to complete their masters' in an efficient manner.

As we continue to make efforts to enhance the student experience, we engaged in initiatives focusing on programs that improve international student satisfaction and engagement and promote a stronger sense of belonging and community. Highlights of our innovations this year are: International Peer Mentor Program, weekly coffee hours, bi-weekly faculty "cookies and conversation" sessions, apple picking trip in New Hampshire, International Student Association conference and community service planning, Intensive English Language Program collaboration with social work students, a community Thanksgiving dinner, and International Week daily events.

We rolled out a newly created mobile-first, ADA compliant website with the overarching goal of strategically marketing and positioning Salem State to prospective students with the goal of boosting college participation rates. This roll out has resulted in nearly 6.3 million unique viewers since its launch 11 months ago. This total reflects an increase of 1.38 million viewers or +22% more unique viewers than in the prior year. The site's overall analytics have also improved such as a 41% bounce rate which is excellent according to web standards. Moreover, we strengthened our brand presence and increased interest in academic programs

through innovative micro-outreach campaigns to specific audiences, in combination with strategic messaging and content strategies across all modalities. These campaigns support diversity and inclusion goals, reinforce community college partnerships, and educational opportunities for the regional workforce. Our click through rates average 2%; the industry standard is 0.22%.

b. Closing Achievement Gaps

We have doubled down on closing persistent achievement gaps:

- Partnered with MA Charter Schools and community-based organizations (e.g., One Goal, Bottom Line, Inversant) to create a pipeline and support for underserved populations.
- Increased on-the-spot admissions programs with Lynn Classical, Academy of the Pacific Rim, Malden, Revere, Lowell, Salem High School, and Salem Academy Charter School.
- Continued the cohort initiative to actively reach out to students who were not progressing at satisfactory levels and offered academic/financial support.
- Diversity and inclusion training was initiated on campus for faculty, administrators, and staff.
- In fall 2017, a Men of Color Learning Community was established. Eighteen students participated in the inaugural launch, with 100% retention this spring. Additionally, in fall 2017, a Women of Color First Year Seminar was established. Based on its success, a Women of Color Learning Community will be launched in fall 2018.
- Seven members of this Learning Community attended the Black, Brown and College Bound Conference in March. We recently had a positive meeting with a local foundation seeking support to continue this work.
- Continue to establish workforce partnerships to assist in promoting student achievement.
- Expanded peer mentor programs at the Bertolon School of Business to help students navigate academic requirements.
- Created “super” and “transfer” advisors to offer support for our most vulnerable students.

We were extremely proud to be recognized by the Education Trust as one of the top ten institutions closing the achievement gap for Latinx students. We have set an ambitious goal of eliminating the achievement gaps (black-white, Hispanic-white, male-female) for six-year graduation rates over the next four years.

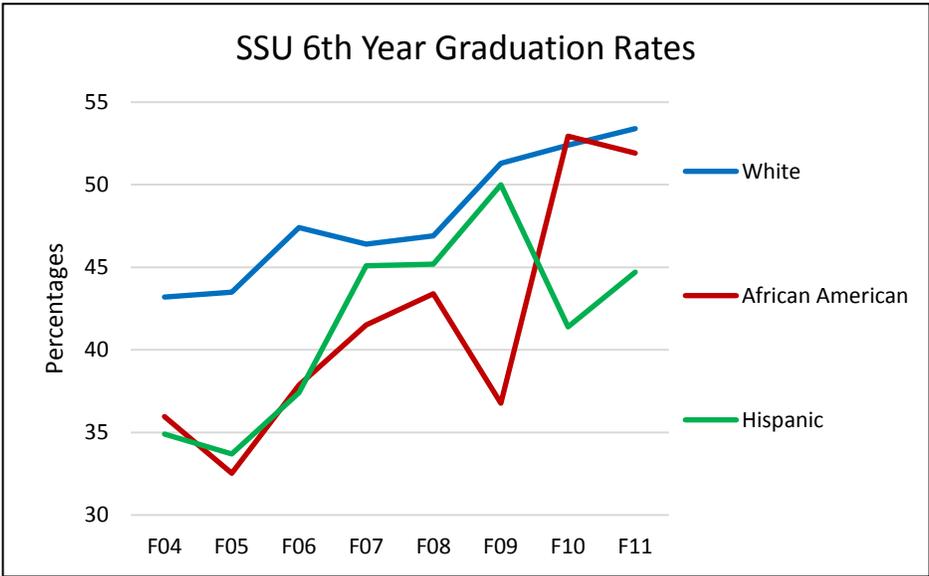
c. Completion/Success

Salem State is committed to increasing graduation and retention rates. We continue to increase the use of data to support evidence based decision making and to inform and evaluate programmatic effectiveness to improve student success. The TRIO, Student Transition and Engagement Program (STEP), and Summer Bridge programs serve an underrepresented student population including first generation, low income (high Pell eligible), racially diverse, and students with learning disabilities. The following are a few of the initiatives that we have created to meet this goal:

- Worked with Institutional Research to begin identifying data sets needed to examine the retention and graduation rates of various student populations.
- Utilized data to share information about student success based on the retention and graduation rates for TRIO and STEP students, which are currently above the averages for the general student population.
- Utilized data from Mapworks to understand student risk and emerging trends based on specific populations.
- First Year Experience (FYE) coordinated individual outreach to first year students several times throughout the year to form institutional connection with students and address issues/concerns.
- To improve college completion rates, we implemented best practices for student success initiatives (e.g., warnings/counseling when dropping a class, streamlined the Satisfactory Academic Progress appeal process).
- The Interdepartmental Collaborative was created bringing together university offices to focus on student progression.
- The add/drop policy was aligned for all students.
- Promoted 15 credits (per semester) to better educate students on the benefits of graduating in four years.
- Completed an internal/external assessment of admissions and financial aid.

- Completed Enrollment Management Operations staff changes to streamline and improve operational services, technology, and collaboration.
- Implemented Apps Anywhere which provides anytime, any device access to academic software.
- Convened a group to look at utilizing Open Educational Resources (OER) to reduce the cost of textbooks for students.

	Sixth Year Graduation Rates							
Student Race/Ethnicity	F04	F05	F06	F07	F08	F09	F10	F11
African American	36.0	32.5	37.9	41.5	43.4	36.8	52.9	51.9
Hispanic	34.9	33.7	37.4	45.1	45.2	50.0	41.4	44.7
White	43.2	43.5	47.4	46.4	46.9	51.3	52.4	53.4



Campus Safety and Violence Prevention (CSVP)

Campus safety and violence prevention remain top priorities. We have implemented the DHE’s best practices for Campus Safety and Violence Prevention with the introduction of (online) Active Shooter Response Training and Preventing Discrimination and Sexual Violence Training. In addition, the Care and Concern team discusses students of concern and protocols with the deans, the Center for Academic Excellence (CAE), FYE, and Disability Services. The Prevention Taskforce

was developed to coordinate efforts; assess effectiveness; recommend tools; and comply with government mandates.

We convened a Bias Response Team to develop and implement a Bias Incident reporting guidance protocol. Chief of Staff Bryant along with Police Chief Labonte convened an Emergency Preparedness, Event policy and Expressive Activities policy review. We have made significant outreach for victims of sexual violence through the Prevention Education Advocacy Response (PEAR) program which is funded by a \$3M Department of Justice grant through 2018. A grant reapplication has been filed for this program.

Campus police procured and have encouraged members of our community to download Rave and the Rave Guardian app (connect users to police with the touch of a button and users can build their own network of guardian alerts). Improvements were also made to video surveillance infrastructure, and e-phones were added to parts of the campus.

We are transferring the management of all study abroad and faculty-led trips to the Center for International Education with the goal of implementing TerraDotta as a travel management platform in AY19 which would significantly enhance the management of study and travel abroad and improve communications.

Increasing Diversity in Leadership Positions

Salem State is committed to seeking academic excellence while continuously striving to be a welcoming, inclusive, and diverse campus. Increasing diversity in leadership positions remains a university priority.

- We have continued to work closely with Black, Brown and Proud (BBP), a student group, regarding their concerns about the office of Inclusive Excellence.
- The Career Ladder initiative offers a transparent view of promotional advancement pathways within ITS and guides professional development investment.

- Human Resources (HR) collaborated with Inclusive Excellence to conduct equity reviews of all employment searches. HR presented a workshop on diversity and inclusion that saw a capacity crowd of 50.
- Inclusive Excellence offered three professional development opportunities to enhance cultural competency; “Culture Coaching: the Power to Transform Leaders and Institutional Climate,” “Anti-Bias and Diversity Training for SSU Police,” and the “Train the Trainer” program.

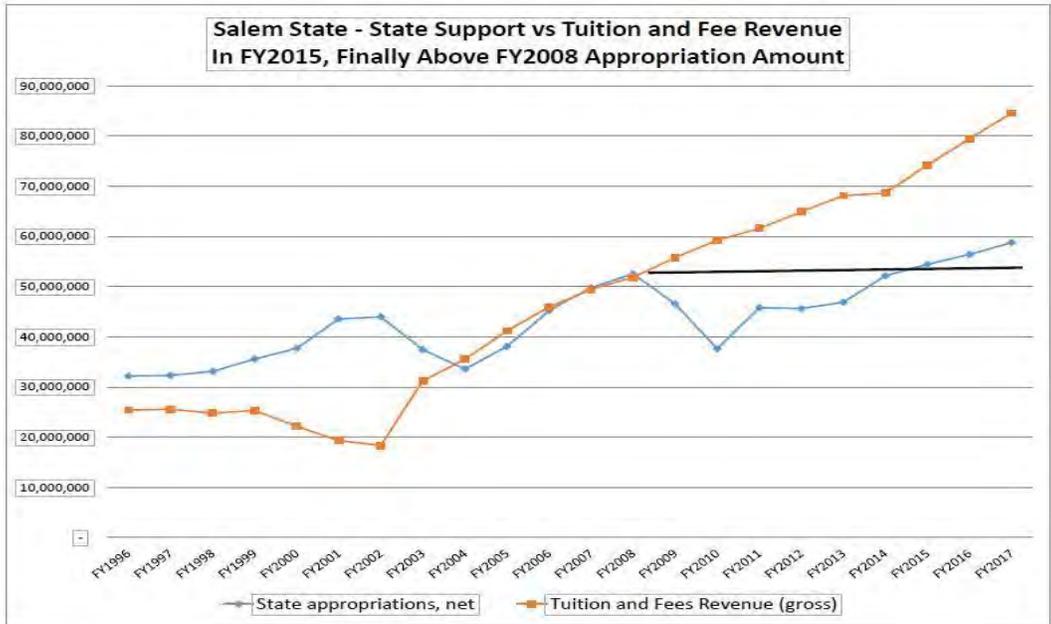
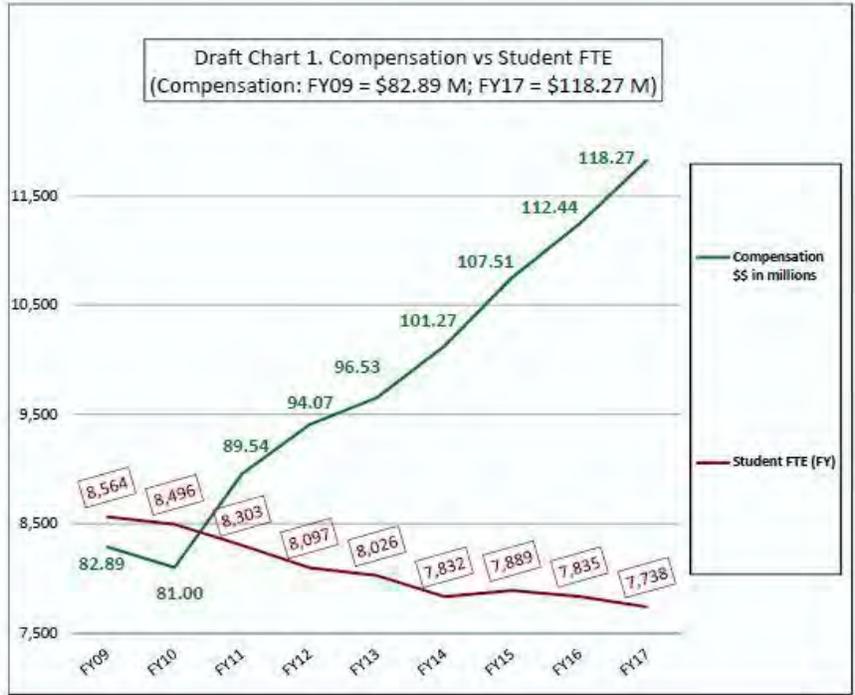
In conjunction, with Board Chair Mattera, we have quite successfully advocated to the Baker Administration to increase Board diversity. Not resting on our laurels where we saw an increase in faculty of color from eight to twenty-three in FY18, we continue to be deliberate in our faculty searches and hope to continue our momentum of increasing the diversity of our faculty for FY19.

Progress on our Strategic Plan

a. Financial Vitality

Our success is dependent on just three words: enrollment, enrollment, enrollment! The charts below depict our challenge – declining enrollment over the past several years, increasing compensation costs and flat state appropriations. We are making every effort to turn this around. If not successful, we will need to reconsider the “true” size of enrollment and make appropriate adjustments to achieve financial vitality.

Draft Chart 1. Total FY Compensation (Salaries/Wages and Fringe Benefits) vs FY Student FTE									
	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
Annual Student FTE	8,564	8,496	8,303	8,097	8,026	7,832	7,889	7,835	7,738
Compensation (\$\$ in millions)	82.89	81.00	89.54	94.07	96.53	101.27	107.51	112.44	118.27



The university's focused enrollment strategy will help to fuel its financial vitality as we continue to turn today's challenges into tomorrow's opportunities.

- Our Marketing and Creative Services department undertook an in-depth analysis of academic programs to determine areas of potential enrollment growth. Studying marketplace degree completion rates, student demand, regional and national job openings, and competitor analysis, produced independent data to guide resource allocations.
- Enrollment Management, Marketing and Creative Services, Center for International Education (CIE) and School of Continuing and Professional Studies (SCPS) collaborated to raise enrollments.
- We implemented a new financial aid leveraging model to provide financial support and increase yield.
- We worked to build a junior, senior strategy to increase inquiries, applications, and admits.
- We enhanced the recruitment and communication strategy to increase applications.
- We have been more intentional in utilizing institutional reports and dashboards as part of our business intelligence and data analytics systems. This reporting and real-time information will become the basis for more informed decision-making.
- Academic Affairs is actively working with enrollment management and marketing to grow student enrollments, particularly adult learners in SCPS. Specific program growth areas include Nurse Practitioner and accelerated Bachelor of Science in Nursing (ABSN), Occupational Therapy (direct entry), Teacher Leadership, and Accounting. In addition, Healthcare Studies and Social Work continue to see increases in enrollment.
- While international enrollments (with 245 F-1 visas and 40 J-1 visa students in 2017) remains a strength versus peer state institutions, our numbers are down significantly since our recent peak (500). We are working to implement Canvas Catalog (an add on to our existing Canvas software) which will greatly facilitate our ability for non-SSU students to take classes.
- A revision to our long-term agreement with Reitaku University in Japan now includes a monetary incentive; we will be welcoming our first 1+2+1 "experimental" cohort from Nanjing Normal University in China this fall, as 14 students become English majors with the option of continuing into our MA

TESOL program; we are finalizing an agreement with Shaanxi Normal University in China to host an intensive two-week teacher training program this summer with the intent of establishing a long-term relationship; we have agreements in discussion with Daito Bunka University in Japan to send students to our Intensive English Language Program and with Shenzhen University in China to also send students to SSU for short-term language/culture programs.

- We successfully obtained a \$40,000 grant from the National Endowment for Humanities (Roopika Risam, English; Susan Edwards, Library) to host leaders from digital humanities programs from other regional comprehensive universities to collaborate on developing a national network of practitioners.
- The university continues to develop strategic revenue building partnerships such as Cat Cove Clam Seedlings and potential Mussel production.
- To increase state and federal grants, we have restructured the area of Sponsored Programs and Research.
- On the heels of our successful 10,000 Reasons Comprehensive Campaign, broad fundraising commitments continue. The total raised to-date: \$1.37million of \$2 million goal for FY18. Major and planned giving grew to \$266,407 for the 50th reunion class (previous average \$44,242).
- Recognizing the need to identify new sources of revenue, we partnered with Capstone On-Campus Management to help us better utilize residence halls and other spaces on campus that remain largely vacant during the summer. This partnership represents an innovative approach to supporting our goal of financial vitality.

b. Collaboration, Inclusiveness and Stewardship – Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship.

My introduction into the presidency came at a time when students across the country began to more vocally; express their concern over the increased incidents of racist and discriminatory acts on college campuses. Salem State was not immune to this as we saw acts of hate (vandalism) on our campus. This prompted me to encourage open and honest conversations about diversity and inclusion from our students, faculty, and staff. I was particularly impressed with our students. They expressed themselves in a manner that made me proud to be their

president and to commit myself to making Salem State a welcoming and inclusive campus. Fortunately, we had already begun a comprehensive campus climate study, beginning with a campus-wide survey. This spring, the Climate Study Implementation Team (CSIT) reviewed the results of the survey and held numerous focus groups to allow further input. I look forward to CSIT presenting their findings to the campus community.

- We are making a concerted effort to increase diversity within the Honors Program by being more intentional in our outreach to students of color. For example, a congratulatory postcard was sent to all first year students of color with a 3.5+ GPA at the end of their first semester. The postcard invited them to attend an informational breakfast and learn about the many benefits of the program.
- The Center for Academic Excellence (CAE) is actively collaborating with all areas within the University to improve/promote student success. For example, CAE staff has been meeting with department chairs to improve collaboration and better meet student and faculty needs.
- Retention services has created liaisons for each academic area, which has resulted in better usage and engagement of Mapworks from faculty and staff.
- Center for Teaching Innovation facilitated several book groups with faculty and staff that focused on racism and microaggressions. Some of the materials used included the following books: *35 Dumb Things Well-Intended People Say* and *Race Talk: the Conspiracy of Silence*.
- The School of Graduate Studies is working with The National Park Service on an MOU. The MOU also includes the Salem Maritime and Saugus Iron Works. This agreement will focus on civic engagement activities for students, faculty, and staff.
- Our mission to increase support for faculty and staff initiatives through private foundations and corporate funding yielded positive results. Some of the initiatives that received private funding include The Upward Bound Program, via the Rogers Family Foundation Grant; Salem High School Mentorship Program, via The Boston Foundation and; The Center for Holocaust and Genocide Studies, via Combined Jewish Philanthropies.

- Launched 16 Crowdfunding projects covering a variety of departments and programs across campus to increase fundraising for designated project. Some of the projects include:
 - Helped the Latin American Student Organization fund their Puerto Rico Community Service Trip over Spring Break
 - Students in the First Year Seminar on Philanthropy raised money for the university's food pantry
 - Endowed the Arlene Greenstein Study Abroad Scholarship which affords qualified SSU students the opportunity to visit another country through short-term or extended experiences. Dr. Greenstein was a former SSU dean.
 - Raised funds for materials for the Vikings Build-A-Bed Challenge – partnership with SSU Center for Civic Engagement, A Bed For Every Child, The Massachusetts Coalition for the Homeless, and St. Jean's Credit Union – where students built 50 beds for children in the North Shore area.
- Institutional Advancement expanded its partnership with Office of Career Services (OCS) to better align corporate partnerships and maximize gift potential.
- Maximizing SSU's investment in the Youth at Risk conference, collaborated with Admissions, Graduate School, Career Services, Alumni Relations, Center for Children and Youth Studies, and Inclusive Excellence.
- Published three print publications; Fall Statement, focusing on 10 years of excellence; Impact, winter donor magazine; and Spring Statement, showcasing the university's entrepreneurship.
- We continue our work with external stakeholders with an emphasis on fund raising, influencing policy, and advancing the reputation of the university. Working with our sister institutions, we advocate for support for public higher education with the administration and legislature, with particular attention to maintaining affordability for our students. We also remain heavily involved with regional business and community partners to generate increased opportunities for our students and faculty within their fields of interest, to better align our programming with the workforce needs of the region, and to advance the region's cultural, social and economic development.

- Many of our faculty and staff serve on boards and committees throughout the region, providing expertise to the business and nonprofit worlds. In my role as president, I share this responsibility by serving on the following boards:
 - Council of State University Presidents
 - Essex County Community Foundation County Leadership Council
 - New England Council
 - Northeast Arc Advisory Board
 - North Shore Advisory Board of the Anti-Defamation League
 - North Shore Alliance for Economic Development
 - North Shore Chamber of Commerce
 - North Shore Workforce Investment Board
 - Salem for All Ages Leadership Council
 - Salem Partnership
 - SSU Assistance Corporation
 - Voices Against Injustice (formerly Salem Award Foundation)

c. Academic Excellence: Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society.

2017-2018 has been a productive year with many advances in Academic Excellence. With the leadership of Provost Silva we introduced several new programs and innovative educational experiences for our students:

- Implementation of self-check tools allowing faculty to check their Canvas courses for ADA compliance in self-paced format.
- Department Class Scheduling will produce adjunct faculty budget projections, personnel costs savings, and streamline course planning.
- Online tracking of adjunct faculty evaluation streamlines the process and increases access.
- The Information Technology Services department is creating a student/faculty hub to showcase and promote academic research.

- New Programs:
 - New programs in School Adjustment Counseling
 - MS in Accounting
 - MS in Athletic Training (BHE recently approved)
 - Online Graduate Certificate in Business (effective fall 2018)
 - Seeking a new Bachelor of Science in Information Technology
 - Working toward a doctoral program in Occupational Therapy
- Innovative Educational Experiences:
 - SSU has been selected to join the Howard Hughes Medical Institute Science Education Alliance's Phage Hunters Advancing Genomics and Evolutionary Science program effective AY19.
 - SSU Library is now a member of the City of Salem's Preservation Partners, a group of local organizations committed to preserving Salem's unique history.
 - SSU was granted a license to hold our first ever TEDxSalemStateUniversity, an event that will be held in September 2018 and will showcase faculty thought-leadership within multiple disciplines.
 - SSU will be hosting the Summer 2018 Project Kaleidoscope meeting of the Massachusetts Region sharing best practices in STEM pedagogy.
 - Summer at Salem State will offer a special series of community events in celebration of the 350th anniversary of The House of the Seven Gables and the literary contributions of Nathaniel Hawthorne.
- Faculty achievements increase our students' educational experiences. A few highlights include:
 - Keja Valens (English) was awarded the 2017 Sylvia Rivera Award in Transgender Studies.
 - Zlatinka Blaber (Accounting and Finance) was awarded a Japan Studies Institute Fellowship organized by the American Association of State Colleges and Universities.
 - Bethany Jay (History) played a central role in the Southern Poverty Law Center Report detailing the insufficiencies of teaching the history of American slavery.
 - David Gow (Psychology) presented at the prestigious Boston HUBweek.

- Cameron Beatty (Education) was awarded the Emerging Scholars Award from the American Personnel Association-College Student Educators International.
- Professional Development: Offered faculty workshops on teaching for equity and diversity; workshops for 100% online programs and online course design; general education courses in Diversity, Power Dynamics, and Social Justice; and faculty learning communities focused on student centered teaching and inclusive excellence.
- Worked with the Biology Department to secure \$127,500 with current funding and planned giving support for student research projects at Cat Cove.
- Secured funding for the Bloomberg Lab terminals totaling over \$200,000.
- Organized the Youth at Risk professional development conference that welcomed over 800 area professionals.
- In partnership with the Center for Creative and Performing Arts (CCPA), theatre department, School of Education and School of Social Work, hosted seven professional development workshops and networking programs.

d. Student Success – Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals.

Academic Affairs has increased student involvement in authentic research experiences with faculty across disciplines. Over the past five years, we have seen increased growth in student participation in both Undergraduate and Graduate Research Days. We have also experienced an increase in our student participation and presentations at regional and national conferences, including: Kennedy Center’s American College Theater Festival; Eastern Sociological Society Annual Meeting; Occupational Therapy 15Th Annual Student Research Day; Massachusetts Statewide Undergraduate Research Conference; and the Black, Brown & College Bound Summit.

Internships allow our students the opportunity to gain relevant learning experience in a workplace environment. To that end, an internship task force was formed to promote better collaboration between our Office of Career Services and academic

programs. Further, the task force will identify best practices that promote rewarding internship experiences.

Executive Vice President Scott James has worked to restructure positions to better serve our students by aligning offices more closely, creating efficiencies, and providing more hands-on staff to work with students. As part of the restructuring, the former director of Student Involvement and Activities (SIA) has assumed the role of director of Residence Life and Student Life Operations. Diversity and Multicultural Affairs combined with SIA and created the Leadership Engagement Advocacy Diversity (LEAD) Office, to address the call for more embedded social justice education in the leadership development of our students. With the reallocated funds, LEAD added a program coordinator for LGBTQIA, and elevated an assistant to an associate director.

Athletics is also reallocating funds, converting more coaches to full-time employees with added administrative duties, to aid in recruiting new coaches and student-athletes. Coaches will assume more responsibility for students' academic success by overseeing Mapworks; developing study halls; and identifying and removing barriers to persistence. Another example of hands-on staff created from reallocated funds is the coordinator for student transition, who will assist with orientation and the development of a coaching model for all new students, and creating collaborations across campus.

Student Life (SL) has been organized into three clusters that allow staff to develop synergy, maximize resources, and focus on reaching depth in high impact practices. As the SL curriculum continues to develop, three-dimensions of learning and development were identified as the foundation for our work: Courageous Leadership; Self-Authorship; and Community Development. Articulated knowledge and abilities were identified with the expectation that students will go from beginner to expert on each dimension. The clusters will create coordinated programming to develop these dimensions in each student. In concert with Academic Affairs, this work will be at the center of the coaching model for all students.

I applaud the work of Cynthia McGurren, our Vice President for Institutional Advancement who has prioritized identifying resources for our underserved students and has been directly involved in fostering professional development opportunities for many of our students:

- A collaboration including CCPA, theatre department, School of Education and School of Social Work, resulted in seven professional development workshops and networking programs.
- The continued partnership with the Bertolon School of Business and Career Services helped to create a job shadowing program, which will launch in the fall of 2018.
- Identified, solicited and secured over \$100,000 in funding in support of my inauguration. Proceeds not used to cover the inauguration (in excess of \$50,000) will be used for scholarships to assist underrepresented students.
- Student Philanthropy Council/Senior Class Gift program leveraged peer-to-peer outreach to educate current students on philanthropy and giving back to their communities.
- A collaboration including the Latin American Student Organization (LASO), Student Advocacy Office, and Student Community Service Group developed fundraising initiatives.

CONCLUSION

While still not through my first full year, quite a start it has been indeed. With each and every day, I am more confident in our ability to meet the increasingly complex challenges facing higher education and deliver for our students an inclusive, excellent, affordable, civically engaged and globally aware education. They deserve no less.

I look forward to working with the BOT and our entire campus team on these goals and priorities during AY 2018-2019.

AY 2018-2019 Goals and Priorities:

- ✓ Increase enrollment +100 students;
- ✓ Obtain funding for STLA;
- ✓ Initiate/plan new comprehensive fundraising campaign;

- ✓ Increase additional auxiliary revenues (summer housing);
- ✓ Gain approval of Occupational Therapy Doctorate (clinical);
- ✓ Gain approval of our BS in IT;
- ✓ Evaluate “online” initiatives/collaborations;
- ✓ Seek “control” of strategic Canal Street properties;
- ✓ Hire a new permanent VP for Diversity and Inclusion;
- ✓ Build on our concerted efforts to increase faculty of color;
- ✓ Continue making positive gains toward closing the achievement gaps;
- ✓ Draft Cat Cove business plan and evaluate private collaborations.



PRESIDENT
Leadership Profile



Contents

Welcome	1
At a Glance	2
The Opportunity	3
Salem State University: An Overview	4
Indicators of 21st Century Growth	5
Points of Pride	6
The Role of the President	8
Opportunities for Presidential Leadership	9
Qualities and Qualifications of the Ideal Candidate	12
The University	14
Serving the Community and Region	22
About the City of Salem	24
Procedure for Candidacy	

Welcome

Dear Prospective Candidate,

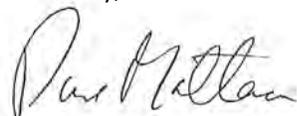
Thank you for your interest in Salem State University's presidential search. As the chairs of the Board of Trustees and the Presidential Search Committee, we invite you to explore this leadership profile and the university's website which will give you a better feel for the campus and its mission. We have high expectations for our 14th president and are confident that this prospectus helps paint the picture of Salem State's trajectory of excellence.

Over the last ten years, Salem State has grown and matured in many ways, including growth in the physical campus, increased diversity and graduation rates, expansion of academic programs, improvements in student life and successful completion of a \$25 million fundraising campaign. As the university has evolved to reflect our global society, we remain committed to our mission, values and heritage and to our strong partnership with the exciting, historic city of Salem, Massachusetts. Today, Salem State University is a flagship of the higher education system in the Commonwealth of Massachusetts, and we remain committed to affordability and accessibility for first generation college students.

Opportunities abound for a new president to continue this forward momentum, to boost private philanthropy, to further expand the university's infrastructure, to strengthen our partnerships with the region and to set a strategic direction for this great institution. Simply stated, Salem State University's foundation is exceptionally strong. If you are a remarkable leader who will propel this institution into the future, we would like to hear from you.

We appreciate your interest in this position and wish you the best as you begin your candidacy. Thank you for your consideration of Salem State University.

Sincerely,



Paul Mattera
Chair
Board of Trustees



Teresa Chisholm
Chair
Presidential Search Committee

At a Glance

Students

Salem State University is the most diverse public university in the Commonwealth with over 29 percent of the student population from underrepresented backgrounds.

9,000

Full-Time Faculty

Salem State's faculty represent a wide variety of academic institutions including the most prestigious in the country and the world. The university has been recognized twice in the past five years as being among the top producing institutions of Fulbright Scholars.

351

Graduation Rate

From 2007 to 2016, the graduation rate for baccalaureate students increased 15 percentage points—the largest change in the state university system.

52%

Campus Investment

Over the past decade, nearly 760,000 square feet of new construction and renovations have been made, bringing state-of-the-art academic and student life spaces to campus.

760,000
square feet

10,000 Reasons Campaign

Salem State University completed its first comprehensive fundraising campaign exceeding its \$25 million goal by more than a million dollars.

\$26
million



The Opportunity

Salem State University seeks a visionary and collaborative president to build on its history of success and lead the university to the next level of achievement.

Salem State is on the move. Designated a university in 2010, our campus has been energized by new state-of-the-art facilities, an increase in freshmen applications, improved student graduation and retention rates, growing alumni engagement, talented leadership throughout the organization and an expanding role in the region.

Located just 15 miles north of Boston, Salem State is one of the largest and most diverse state universities in the Commonwealth of Massachusetts and is an important partner in the economic, cultural and intellectual vitality of the greater north-of-Boston region. Situated in the historic seacoast city of Salem, Massachusetts on more than 115 acres and five campuses, Salem State provides a diverse community of over 9,000 students, a high quality, student-centered education; one that prepares them to contribute responsibly and creatively to a global society and to serve as a resource to advance the region's cultural, social and economic development.

The university supports a full-time faculty of over 350 and offers 32 undergraduate degree programs in the liberal arts, human services and business, along with graduate programs that offer degrees in 24 fields such as education, science, humanities, business, criminal justice, and nursing, among others. The university also has a continuing education division that offers both credit and non-credit programs.

Salem State's faculty represent a wide variety of academic institutions including the most prestigious in the country and the world. The university has been recognized twice in the past five years as being among the top producing institutions of Fulbright Scholars. Faculty hold a deep commitment to teaching and learning and pride themselves on connecting with students at an individual level. Student learning opportunities are personal and collaborative, yet large enough to broaden students' understanding of their world.

The university's students hail from 28 states and 63 countries. The university is proud that 35 percent of its 2016 freshman class self-identified as being students of color. Salem State has over 65 student groups and clubs, 15 varsity teams along with intramural sports, and hundreds of student activities scheduled throughout the year. The university has a nationally award-winning residence life program. One-third of the undergraduate degree-seeking population, including two-thirds of the freshman class, lives on campus. More information about the university and the presidential search can be found at saalemstate.edu.

For information regarding how to express a candidacy or to make a nomination for this position, please see the section entitled "Procedure for Candidacy" at the end of this document.



Salem State University: An Overview

Salem State's 163-year history reflects the growth of its mission and its vital role in the nation, the Commonwealth and the local community. From its beginnings as a teaching college to the large, diverse and comprehensive academic institution it is today, the university has remained true to the value of its founders, and continually seeks a forward path, adapting to society's changing needs while ensuring the intellectual and material well-being of the North Shore region of Massachusetts and beyond.

Mission Statement

Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society, and serve as a resource to advance the region's cultural, social and economic development.

Vision

Salem State University will be a premier teaching university that engages students in an inspiring transformational educational experience.

- We put students first in all that we do and are committed to their success.
- We are a community of learners where all faculty, staff and students have the opportunity to grow as individuals.
- We are innovators, offering a unique brand of public higher education that inspires students to reach higher and achieve more.
- We remain true to our heritage as a liberal arts university while we prepare students for today's workforce.
- We serve the communities of the North Shore while we create an ever more globally aware and culturally diverse campus environment.

The Board and Department of Higher Education

Salem State University is part of the Massachusetts public higher education system, which is comprised of nine state universities, 15 community colleges and the five-campus University of Massachusetts System. Tasked with defining the mission of and coordinating the Commonwealth's system of public higher education, the Board of Higher Education (BHE) has a particular responsibility for the state universities and community colleges and broad oversight responsibility for the University of Massachusetts. The Department of Higher Education, headed by a Commissioner, is the executive arm of the Board of Higher Education. The Board participates in the appointment of community college and state university presidents, approves presidential appointments and sets presidential compensation. The Department of Higher Education is one of three agencies in the Commonwealth, and the Executive Office of Education facilitates communication and coordination between and among those three education agencies.

The BHE is responsible for establishing statewide, system goals for the state universities and community colleges. The BHE is currently reviewing existing statewide goals within the context of developing a statutorily mandated performance measurement system for public higher education institutions. Meanwhile, the existing statewide goals are embodied in the Vision Project, an initiative that aims toward national leadership in six key areas of educational work: (1) college participation; (2) college completion; (3) student learning; (4) workforce alignment; (5) closing achievement gaps; (6) educating citizens. Each year the BHE collects data tracking progress on these outcomes for each institution, and shares these data with presidents and campus boards. The BHE has also launched a major initiative to achieve cost savings through heightened collaboration among the colleges and universities and asks the individual colleges to participate in these efforts.

Indicators of 21st Century Growth

	2006	2016	CHANGE
Student FTE	7,225	7,226	0%
Resident Students (Housing capacity not students housed)	1,404	2,282	63%
Percent Students of Color	14.8%	29.4%	99%
Graduation Rate*	37%	52%	41%
Full-Time Faculty	320	351**	10%
Degrees Awarded	1,434	2,214	54%
Campus (number of buildings)	20	29	45%
Campus (total square feet)	1,152,221	2,046,328	78%
Total Revenues	\$106,813,338	\$163,958,382	53%
International Partnerships	3	25	733%
Community Service Hours	1,281	359,891	27995%
Percent of Students on Deans List	38%	44%	16%

*Data is from 2007 and 2017 (projected)

**2015 IPEDS data





Points of Pride



- **University Status** – In 2010, Salem State College became Salem State University, a legislated change in status which reflected the large, comprehensive institution the university had become. University status brought greater recognition to the high quality of Salem State’s academic programs and the many accomplishments of its faculty and students. With the university designation, Salem State expanded academic programming grounded in the expertise of its faculty and designed to address the changing needs of its community and workforce. Among many highlights, Salem State’s School of Social Work was ranked #91 (of over 250 programs) by *US News & World Report* in 2016 and is the highest ranked public program in Massachusetts.



- **Increased Graduation Rates** – Student success is Salem State’s key goal. From 2007 to 2016, the graduation rate for baccalaureate students increased 15 percentage points—the largest change in the state university system. Salem State’s six-year graduation rate for first-year freshmen increased from 37 percent in 2007 to 52 percent in 2016, with a graduation rate for transfer students at 67 percent. This growth reflects the exceptional efforts of faculty and staff to support students, and the university continues to set aggressive goals in the area of student success.



- **Diverse Community** – Salem State University is the most diverse public university in the Commonwealth with over 29 percent of the student population from underrepresented backgrounds. In addition, over 35 percent of students identify as first generation college students. Salem State is known for its culture of inclusion and, over the last five years, the university has expanded cultural and identity based programs and dialogues. Given population trends, the university is preparing to be a Hispanic Service Institution in future years. Salem State recently added a vice president of diversity and inclusion to the President’s Executive Council.



- **New State-of-the-Art Academic and Student Life Spaces** – Changes to the physical campus over the past decade are profound. Nearly 760,000 square feet of new construction and renovations have been completed or are underway, bringing state-of-the-art academic and student life spaces to campus. Through the support of the Commonwealth of Massachusetts and generous donors, combined with resources of the university’s operating budget, over \$250 million has been invested in campus improvements. Highlights of these changes include the Frederick E. Berry Library and Learning Commons, the Sophia Gordon Center for Creative and Performing Arts, the Harold E. and Marilyn J. Gassett Fitness Center, athletic fields and courts, and two residence halls that provide accommodations for nearly 900 students. Efforts are currently underway to secure the Commonwealth’s support for a new science facility to meet the strong demand for science, health care, and technology programming.

- **Residential Campus** – In recent years, Salem State has shifted from a commuter campus to a more residential campus. Currently, one-third of the undergraduate degree-seeking population lives on campus, one-third lives in local neighborhoods, and the remaining third commutes from home. In addition to new residential facilities, Salem State has also added a new student life co-curriculum.

- **A Successful Comprehensive Fundraising Campaign that Raised Over \$26 Million** – In December of 2016, Salem State announced the successful completion of the university’s first comprehensive campaign. Exceeding its \$25 million goal, over \$26 million was raised during the campaign from more than 11,000 donors, with a remarkable 93 percent participation rate among faculty and staff. The funds resulted in the establishment of 48 new scholarships for students and much needed financial support for academic programs.



The Role of the President

The president serves as the chief executive officer of Salem State University and is responsible for ensuring the university delivers high-quality, student-centered programs for a diverse community of learners, in accordance with the institution's mission.

The president reports to the **Board of Trustees**. Reporting to the president are the members of the **President's Executive Council (PEC)**:

- Provost and Academic Vice President
- Vice President of Enrollment Management, Student Life and Marketing
- Vice President for Finance and Business
- Vice President for Diversity and Inclusion
- General Counsel and Vice President of Administration
- Vice President of Institutional Advancement
- Executive Director of Strategic Planning and Decision Support
- Chief of Staff to the President

The president has an **office staff** of six full-time members, including:

- Chief of Staff to the President
- Director of External Affairs
- Director of Public Relations
- Executive Assistant and Secretary to the Board of Trustees
- Public Relations Associate
- Senior Assistant and Assistant Secretary to the Board of Trustees

Salem State's Leadership Cabinet members also work closely with the president and meet two times per semester. Members of the cabinet include senior academic and administrative staff across the institution. A full list of **cabinet members for academic year 2016-17** is available [here](#).

Additionally, the president serves as a member of the Council of Presidents of the Massachusetts State University System, along with the presidents of the eight other institutions in the Massachusetts State University System.



Opportunities for Presidential Leadership

Under the leadership of its current president, Salem State has thrived through historic changes in the regional and national landscapes for public higher education. Among its many achievements and distinctions, the university has recently begun to employ efficient planning processes tied to budget and measured by outcomes and data based dashboards. Having come to the end of its last strategic plan and celebrated the successful conclusion of a supporting comprehensive campaign, the university began a visioning and strategic planning process in fall 2016. The plan will be presented to the Board of Trustees in June 2017 for approval but will be open to revision after the review and input of the next president.

The next strategic plan has much on which to build. The university is a thriving and caring campus community distinguished by academic quality and achievement; a student-centered approach to teaching and learning; deep roots in the liberal arts tradition; a strong and enduring commitment to diversity and social justice dating back to the university's connections with early abolitionists; dedicated faculty, staff and students who strive to do and be their best; and accomplished alumni who are making a difference in their professions, their communities, and the wider world.

Undergraduate education is the cornerstone of Salem State's mission. Alumni speak passionately about the transformational experience that the university provides to its students, the more than 35 percent of whom are first generation college students. Salem State is committed now and for the future to its liberal arts heritage, academic freedom, equity and access, affordability, inclusivity, social justice, student-centeredness, and a sense of community that gives it a small-college feel in a university setting. The university's colleges educate and empower Salem State's students to become responsible global citizens and contributors to the regional community and economy.

Recent investments in student services and support, campus life, and new residence halls, as well as a continued commitment by faculty and staff to student success have been responsible for a significant rise in retention and graduation rates, and especially so among underrepresented populations. The university also has a long history of offering excellent graduate education. The programs in the graduate school include some of the largest in the university and have a major influence on preparing the workforce in the Commonwealth. Graduate education supports the strong undergraduate experience at Salem State, and the university seeks to expand its graduate education capacity moving forward.

The university's strategic plan will leverage a number of strengths:

- Salem State will continue to be a thriving, welcoming, inclusive, adaptive university that graduates civically minded, socially conscious individuals ready to tackle whatever challenge comes their way; they will be motivated to engage in addressing societal problems that affect the common good and well prepared to succeed and lead in their careers and communities.
- Salem State will continue its impressive gains in retention and completion rates, closing the achievement gap between majority and under-represented student populations, and doing its part to meet the evolving workforce needs of our state and region.
- The university will continue to grow in recognition and respect for its innovative thought leadership, for its leadership in the realm of diversity and inclusion, and for championing causes of social justice.
- Salem State will leverage its location in historic Salem, on the North Shore of Massachusetts and in close proximity to the state's capital, in ways that both enhance the educational experience of students and contribute significantly to regional health and prosperity.
- As a result of effective fiscal planning, asset management, financial efficiency and fundraising, Salem State will grow more financially stable and invest more fully in its mission, in its students, and in realizing its potential as a great public university.

Key Presidential Priorities

Strategic Focus

- The university's strategic plan will provide the next president and the university community a set of priorities for moving forward, along with the flexibility and room to bring those priorities to life through strategic implementation. Given regional and state demographics and public higher education's resource constrained environment, it will be important for the president and university community to agree quickly on a clear, concise and realistic vision and focus to guide decision making, specifically around which current and future initiatives fit within the vision and should be moved forward.
- The new president will be expected to work collaboratively across the university to strengthen Salem State's financial foundation, align resources with priorities, and foster innovation and continuous improvement in all areas of the university.
- The new president will be expected to work collaboratively across the state's public higher education system and improve the institution's performance on each of the key statewide system goals identified by the Board of Trustees and Department of Higher Education.
- Given the university's current contractual and debt obligations, revenue growth is essential to support current and new strategic initiatives. In addition to fundraising, the greatest potential exists in the following areas:
 - Graduate and continuing education enrollment
 - Public private partnerships
 - Campus utilization—emerging opportunities exist to more fully leverage campus space year-round

Academic Excellence and Student Success

- Salem State prides itself on a long tradition and commitment to excellence in the liberal arts and sciences and complementary graduate programs. The university needs to continue to develop and support high-quality academic programs, outstanding faculty, and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce, rapidly changing economy, and increasingly complex and global society.
- As the most diverse campus among Massachusetts' nine state universities, Salem State must create a challenging and supportive learning environment that fully engages all students in their learning and promotes attainment of academic, personal and career goals.
- The university's continued investment in undergraduate student engagement and residential programming has paid off with increasing retention and persistence rates and a robust campus life environment. Given regional demographics, undergraduate enrollment is expected to stay level. However, graduate and continuing education enrollment offers significant potential for enrollment and revenue growth and needs strategic leadership to make that happen. In addition, in 2017 the university is seeking approval for doctoral education.
- Among the university's immediate priorities is the successful conclusion of an Association to Advance Collegiate Schools of Business (AACSB) accreditation process for the Bertolon School of Business.

University Advancement

- The president must be an active external representative and fundraiser for the university, building on the success of the recent comprehensive campaign and focusing on better engaging the university's vibrant alumni community to foster a culture of philanthropy.
- Among Salem State's hallmarks is its leadership in civic engagement through real-world learning opportunities, service to the community, and collaboration in the cultural, social and economic development of the region and state. The next president is expected to continue to model and promote civic engagement.
- Salem State has been steadily increasing public awareness of its academic strengths, institutional distinctions, and achievements and contributions of the university's faculty, staff, students, and graduates. More work needs to be done at the state level to advocate for investment in public higher education and, particularly, in Salem State's unique blend of programs and role in workforce development and cultural contributions to the region. The president will be a partner with the external local and regional communities and will serve not only Salem State's internal constituents, but also play a key role as a visible leader and advocate for public higher education in the Commonwealth of Massachusetts.

Community and Team Building

- The president of Salem State plays an important visible, internal role in building a culture of collaboration, teamwork, integrity and respect.
- Like many institutions of public higher education across the country, Salem State is improving its ability to foster a university-wide culture of excellence, accountability, collaboration and inclusion that attracts and retains talented, diverse faculty and staff committed to student success and university goals. The next president will inherit a strong, talented senior leadership team that is committed to incorporating contemporary best practices in the university's management functions. The community is committed to the principles and practice of shared governance and seeks a president who will support efforts to increase effective engagement and involvement of university constituents in strategic decision processes.
- Salem State University's culture and history as a tightly knit community has been tested by the changing external landscape. A president who can embrace and build trust with this community, communicate with transparency about the challenges and choices ahead, and invite broad participation would be welcome.
- As the institution evolves, it is critical that the university invest in and open access to internal professional leadership opportunities. Utilization, retention and celebration of talented faculty and staff are essential to the success of the organization.
- The diversity and active engagement of Salem State's student body are among the institution's unique strengths. Though the university has historically had a diverse population, the student body has become significantly more diverse over the last ten years, and in 2016, it hired its first Vice President for Diversity and Inclusion. The university is currently undertaking a **campus climate study** to assess how students, faculty, and staff experience the current campus environment. The new president must continue to embrace Salem State's historical commitment to diversity, actively engaging in conversations with students, faculty, staff, and alumni about what diversity and inclusion means for the institution today. Additionally, more work can be done to continue to actively recruit and retain diverse faculty members who will reflect the growing diversity of the student body.

Modern, Safe and Sustainable Campus Environment

- Salem State has been making progress in providing up-to-date and environmentally friendly facilities (including new buildings being LEED certified silver or better), technology and infrastructure to meet evolving needs, advance teaching and learning, and attract high-quality faculty, staff and students. A campus master planning process is underway that will identify the most cost effective and value added improvements, as well as recommendations for consolidation and strategic use of its multiple campuses.

Qualities and Qualifications of the Ideal Candidate

Salem State's president will be a visionary and collaborative leader of people and programs with outstanding communication and interpersonal skills. Minimum qualifications include:

- An earned doctorate (including but not limited to a PhD, JD or EdD) coupled with substantial experience relevant to Salem State's mission and needs; in exceptional circumstances, an earned master's degree, coupled with substantial experience relevant to Salem State's mission and needs may satisfy minimum educational requirements.
- Substantial experience in a senior-management position in higher education, or outside higher education where such experience is deemed relevant to, and provides a basis for judging the candidate's capacity to serve as a college or university president.

To be successful, the president must also possess: the capacity to articulate and implement a shared vision; a commitment to shared governance; a record of successful administrative experience; and proven financial management skills. The ideal candidate will demonstrate a track record for creating and strengthening relationships with multiple stakeholders. Successful, hands-on experience with constituent relations and fund raising is essential.

In addition, the president should demonstrate the following preferred characteristics:

- Commitment to fostering excellence in teaching and research
- Entrepreneurial skill and willingness to take risks
- Evidence of significant fiscal responsibility, strong business and financial acumen, and creativity in maintaining a healthy financial position to support mission delivery
- Experience in and/or commitment to public higher education
- Prior executive-level experience
- Deep understanding of the current context of public higher education nationally
- Ability to lead change
- Data based decision-making approach that balances transparency and consultation with ability to make tough decisions
- Experience with and/or deep interest in student interaction and advocacy
- Commitment to fostering an open, accessible and diverse community
- Understanding of the role of faculty and staff, particularly in an institution guided by collective bargaining
- A collaborative and naturally consultative leadership style
- Ability to distill, reflect and articulate complex ideas and information to the university's constituents
- Ability to build effective partnerships with external constituents
- Ability to be a successful fundraiser for the university
- Charisma and an ability to share the institution's success stories with the broader community
- Ability to partner effectively with a public board of trustees
- Understanding of and ability to work effectively in the political landscape
- Blend of energy and stamina
- Ability to listen, build trust and move initiatives forward



The University

Salem State's academic structure is comprised of the College of Arts and Sciences, the College of Health and Human Services, the School of Education, the Bertolon School of Business, the School of Graduate Studies, and the School of Continuing and Professional Studies.

Salem State's top undergraduate majors include: business administration, nursing, education, criminal justice, biology, psychology, communications, sport and movement science, English, social work and history. The university's liberal arts model prepares students to think critically, communicate effectively and ready themselves to fulfill the demands of tomorrow's changing work force. They are assisted in this endeavor by a highly credentialed faculty.

Salem State's **School of Graduate Studies (SGS)** provides a graduate experience and a degree that helps students reach their goals. SGS offers degrees in 24 fields that allow students to earn master's degrees, graduate certificates, educator licensure, and a Certificate of Advanced Graduate Study (CAGS) in education. The disciplines include: Master of Arts, Master of Arts in Teaching, Master of Science, Master of Business Administration, Master of Science in Criminal Justice, Master of Education, Master of Science in Nursing, Master of Science in Occupational Therapy, and a full-time program in Master of Social Work (the only program of its kind among the Massachusetts state universities). SGS graduates become leaders in their professions and communities. Students apply what they learn in the classroom and through their original research to their jobs and develop professional networks with faculty and area workplaces.

The **College of Arts and Sciences (CAS)** is home to the university's general education curriculum, the cornerstone of the university's commitment to offer all students an academically rewarding and intellectually diverse education. CAS is home to 20 departments, such as art + design, theatre and speech communication, English, biology, chemistry and physics, computer science, world languages and cultures, history, economics, and geological sciences, to name but a few. It is important that all students explore ideas, test concepts, learn, grow, and most of all question. The college's goal is to offer its students the best academic preparation and degree possible.

The **College of Health and Human Services (CHHS)** houses four of Salem State's service-oriented programs: the schools of nursing and social work and the departments of criminal justice and occupational therapy. Each program blends academics and field-work so students graduate with a well-balanced education that prepares them to join the work force or pursue advanced degrees, which are offered in each of the programs. Recognizing the unique interdisciplinary nature of the respective professions, CHHS seeks to promote a humanistic, caring environment, which maximizes student potential and instills sensitivity to current social problems and issues.





The **Bertolon School of Business**, which honors the generosity of entrepreneur and alumnus Henry Bertolon '74 and his wife, Donna, instills in its undergraduate and graduate business majors the development of strong business skills, sound ethics and a global world view. As Salem State's largest undergraduate major, it attracts students—and faculty with diverse specialties—from across the region and throughout the world. Students pursue a number of majors within business including accounting and finance, marketing, management, and decision sciences.

The **School of Education**, the university's founding program, has nearly 20,000 graduates that are making a difference as public school teachers, early childhood professionals, counselors, higher education administrators, community educators, and nonprofit directors. Through a recently transformed curriculum, students have the opportunity to pursue the combined bachelor's and master's 4+1 program which is designed to send expertly prepared, experienced teachers into our public school classrooms. Promising careers in education abound in communities across the Commonwealth—from preschools, K-12 schools, universities, childcare centers, and afterschool programs to national parks, museums, group homes, health centers, and hospitals.

The **School of Continuing and Professional Studies (SCPS)** is home to part-time and off-campus undergraduate programs, Salem State Online, Summer at Salem State, and the Center for International Education. SCPS works closely with community and international partners, businesses, and other institutions of higher education to provide expanded access to Salem State's academic programs and resources. The university offers undergraduate degrees and international education programs in a wide range of disciplines, including business administration, nursing, psychology, and education.





Faculty

As of fall 2015, 91 percent of Salem State's 351 full-time faculty members held terminal degrees: 84 percent held doctorates and 7 percent of creative and performing arts faculty held MFAs, while 9 percent held master's degrees or the equivalent and, of these, six are currently enrolled in doctoral programs. Among full-time faculty members in 2015, 80 percent identified as white, non-Hispanic (compared to 90 percent in 2010) and 56 percent were female (compared to 53 percent in 2010). Of Salem State's part-time faculty, in 2015, 95 percent continued to identify as white, non-Hispanic, while the number of females increased to 61 percent (compared to 59 percent in 2010).

Students

For the fall of 2016, Salem State received over 6,000 applications from prospective first time undergraduate students, an increase of nearly 30 percent over the past five years. The acceptance rate was 74 percent, and the yield was 25 percent. A total of 1,145 first time freshmen enrolled, with 35 percent identifying as students of color, 65 percent women and 35 percent men. Salem State's students come from 28 states and 63 countries.

For transfer students, 752 new students enrolled with 38 percent identifying as students of color, 59 percent women and 41 percent men.

Overall, the undergraduate enrollment is 7,346 with 38 percent identifying as students of color, 59 percent women and 41 percent men.

Just over 37 percent of Salem State's eligible undergraduate students receive a Pell Grant. Eighty percent apply for financial aid, and 78 percent of all degree-seeking undergraduates receive some type of financial aid—grants, loans or scholarships. Approximately 35 percent are first generation college students.

At the graduate level, 358 new students enrolled in the fall of 2016 with 19 percent identifying as students of color, 76 percent women and 24 percent men.

Veterans and Active Military

Salem State is proud to be a Military Friendly School as identified by *G.I. Jobs*. The university has also been recognized as one of the "Best for Vets" by *Military Times*, as well as a Top College and University by Military Advancement Education. Salem State hosts a student veteran organization that was awarded "Chapter of the Month" in 2013. Salem State is a member of the Paul Revere Battalion of the Army ROTC Program, a group that includes MIT, Harvard, Wellesley, Gordon, Endicott, and Tufts Colleges/Universities. Approximately 250 veterans and active military are enrolled at Salem State.

Alumni

Salem State has over 60,000 living alumni, approximately 80 percent of whom are Massachusetts residents. The alumni association is a vibrant group of volunteers who have a leadership role in both friend and fundraising. There are a number of affinity groups to engage alumni, and over 50 alumni-based events each year. One member of the university's board of trustees is selected by the alumni association Board to represent the alumni on this governance entity.

Student Life and Enrollment Management

At Salem State, the area of student life is committed to helping students balance their academic, social and civic responsibilities with their own personal growth and development. Staff in student life are advocates for diversity and social justice, which is reflected in programs and services. The university has a very active student government, as well as over 65 student groups and clubs. Recently, student life has also:

- Increased its focus on student leadership and social justice
- Shifted to a "one stop" navigation center for students
- Grown Salem State's Greek life community
- Hired a new assistant vice president and dean of students who is restructuring student life to include an "Engagement Cluster," a "Wellness Cluster" and a "Student Experience and Transition Cluster"

Athletics and Recreation

Salem State offers its students a chance to compete in a variety of competitive intercollegiate conferences and intramural athletic clubs. With the addition of a state-of-the-arts fitness center, the Gassett Center, students enjoy 40,000 square feet of aerobic and strengthening space along with open areas for various classes and "pick-up" sports.

Salem State fields men's and women's teams in 15 sports; plus 10 intramural/club teams.

Athletic teams compete in the Eastern Collegiate Athletic Conference (ECAC) Division III, the Little East Conference (LEC), the Massachusetts State College Athletic Conference (MASCAC), the National Collegiate Athletic Conference (NCAA) Division III, and the New England College Athletic Conference (NECAC).

Intercollegiate Sports:

Baseball (m)	Lacrosse (m/w)
Basketball (m/w)	Soccer (m/w)
Field Hockey (w)	Softball (w)
Golf (m)	Tennis (m/w)
Ice Hockey (m/w)	Volleyball (w)



Governance

Salem State's board governance consists of an 11-person board of trustees. Nine trustees are appointed by the governor for five-year terms, renewable once; one alumni trustee is elected by the alumni association for a five-year term, renewable once; and a student trustee is elected by the student body for one year, renewable. Regular meetings of the board are held four times annually, and as needed.

In accordance with the laws of the Commonwealth and regulations enacted by the Massachusetts Board of Higher Education, the composition, duties and powers of the Salem State University Board of Trustees are articulated within the university's bylaws. The board is charged with the fiduciary management of the institution, including determination of fees, establishment of personnel management policy, staff services, and the general business of the institution. Among its responsibilities, the board appoints the president, subject to the approval of the Massachusetts Board of Higher Education; annually evaluates the president's performance and submits its review to the Board of Higher Education; adopts an annual plan of financial operation; awards degrees in approved fields; and develops the mission statement for the university consistent with the mission of the Commonwealth's system of public higher education and statewide, system goals established by the Board of Higher Education.

Salem State University operates under the principles of shared governance and is governed internally by a series of committees that represent the three campus constituencies: students, faculty and the university administration. Each committee focuses on a different aspect of the institution, recommending policy, advising the administration of community needs or concerns, and voting on committee business. Committees fall into two categories:

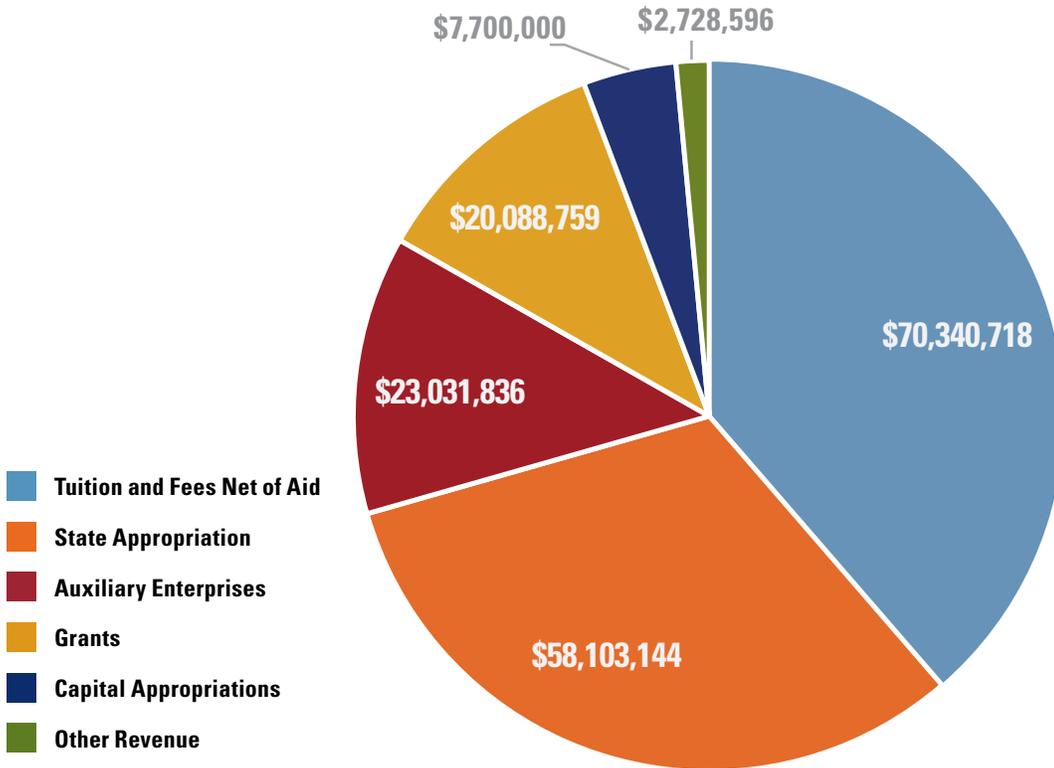
- University contract committees are required by contractual agreements for each state university. At Salem State they include academic policies, curriculum, library/media development, student affairs, and all-university, which acts as the primary agent for coordination and implementation of all contract committees, except for graduate education council, and makes recommendations to the president.
- Non-contract committees, which include both five committees required by law and 26 university advisory committees, are formed by the university president with representatives appointed by the faculty, administration and student government association.



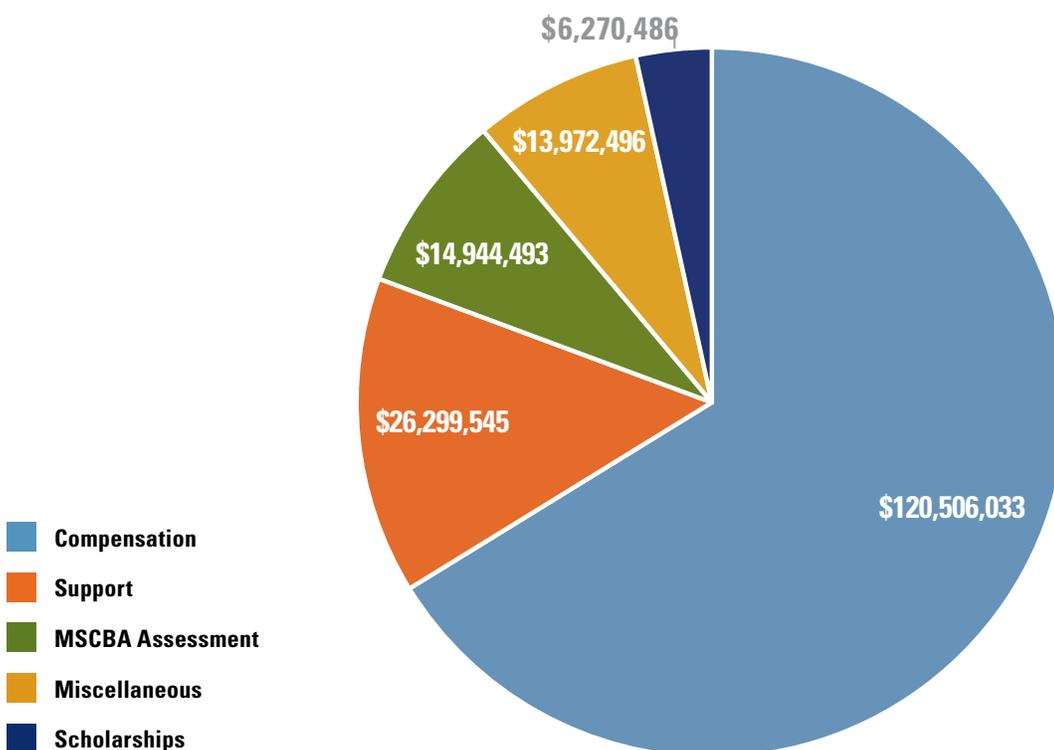
Resources

In 2017 Salem State University transitioned the scope of its budget from an operating budget to an all funds budget. The 2017 all-funds budget is \$182 million and includes the state direct unrestricted appropriation of \$44 million plus funding to pay for fringe benefits expenses, for employees covered by the state payroll, of \$13.9 million.

FY2017 Revenue Budget



FY2017 Expense Budget



The **Salem State Foundation** is a 501(c)(3) private, not-for-profit, tax-exempt organization that raises and manages charitable gifts in support of the university through active fundraising and advocacy. Working with the university and other partners, the foundation operates under the leadership of a **19-member board of directors** comprised of alumni and community leaders. The foundation is legally separate from the university. The foundation also works with university partners to:

- Manage a portfolio of \$27.3 million, with an endowment of \$25.7 million (as of December 31, 2016)
- Increase annual disbursements to academic and administrative departments
- Cultivate and steward a culture of philanthropy

The **Salem State University Assistance Corporation (SSUAC)** was created by a special act of the state legislature in 1994 to facilitate the physical campus growth and development of Salem State and to manage and operate the Enterprise Center. Through the SSUAC, Salem State has been able to build its Central Campus, Canal Street parking lot, purchase the Salem Diner (strategic acquisition), as well as several smaller real estate transactions. The Enterprise Center drives regional business through education, leadership, advocacy, community and economic development on the North Shore. It serves business owners, leaders and employees of companies of all sizes, in all industries and all stages of the business lifecycle. A vibrant component of economic development for the North Shore and beyond, the Enterprise Center also leads the North Shore Alliance for Economic Development and houses the Small Business Development Center and Massachusetts Center for Business Development for the region. The SSUAC owns and operates commercial rental properties. Salem State and the Enterprise Center have partnered to offer professional development courses and to promote entrepreneurship opportunities for our students. The SSUAC is legally separate from the university and the university is not financially accountable for the SSUAC.

The **Massachusetts State College Building Authority (MSCBA)** assists the nine state university campuses with the financing, planning, design, and construction of revenue generating buildings such as residence halls and student activity facilities. MSCBA also oversees the management of these facilities with regard to maintenance and renovations. Over the past ten years, MSCBA has supported the addition of two major residence halls, a large dining facility, the Gassett Fitness Center, the Sophia Gordon Center for Creative and Performing Arts, and a 700+ space parking garage.

Debt:	On-Book (Bonds and Note)	\$40 million
	MSCBA owned projects	\$202 million
	Leases	\$3.4 million

The **Division of Capital Asset Management and Maintenance (DCAMM)**, an agency within the Executive Office for Administration and Finance, is responsible for capital planning, major public building construction, facilities management, and real estate services for the Commonwealth of Massachusetts. In that role, DCAMM collaborates with all state colleges and universities on the construction, maintenance and renovation projects for academic spaces that are owned and funded by the Commonwealth. The most recent example of a DCAMM project at Salem State is the Frederick E. Berry Library and Learning Commons.

Collective Bargaining

Union representation at Salem State University includes three collective bargaining units:

- American Federation of State County and Municipal Employees (AFSCME)
- Association of Professional Administrators, Massachusetts Teachers Association (APA)
- Massachusetts State College Association, Massachusetts Teachers Association (MSCA)

More information on the collective bargaining agreements may be found at the web-site for the **Massachusetts Board of Higher Education**. The agreements are entered into by and between the Board of Higher Education, acting through the Council of Presidents of the State Universities, and the respective collective bargaining agents for members of the bargaining units.





Serving the Community and Region

Community service is one of the university's cornerstone activities. In FY14, students provided 429,510 hours of community service in the following categories: academic service-learning (2,106); forms of community service not including service learning students (608); total number of students who engaged in community service (2,714); and number of courses that integrate community service with academic content (260). Salem State helps support over 80 different local community service groups. Faculty and staff have also been involved with community partners in the planning of programs, and delivery of services and have led non-profits through the process of obtaining 501(c)3 status. For the past three years (2013, 2014, and 2015), Salem State has achieved the highest federal recognition possible for an institution of higher education, with placement on the President's Higher Education Community Service Honor Roll.

Positioned as a public good/resource, the university's collaboration with businesses on the North Shore and beyond have been extensive. University leadership is represented in the North Shore Chamber of Commerce as well as many of the city/town chambers of the region. Expertise of faculty and administration is sought in developing workforce educational programs through the North Shore Workforce Investment Board and business specific opportunities. Many academic service-learning experiences are based in the real needs of local non-profits or small businesses bringing much needed consultation to these entities. Through the Career Services Center, students are able to secure a wide range of internships and other work-related experiences.

Salem State has extensive partnerships with the school districts of the region including three laboratory schools. The Horace Mann Lab School, located on the university campus, is led (as principal) by a faculty member from the School of Education. The mutually beneficial collaborations allow Salem State to continually improve its educational offerings while bringing the benefit of research and resources to the school.

A leading institution in the north-of-Boston region, the university is the second largest employer in the city of Salem and one of the top five employers on the North Shore; 1,000 university employees live in Massachusetts; 177 reside in the city of Salem. The university generated more than \$827 million in economic spending in Massachusetts in FY14, over \$443 million of spending in Essex County and over \$100 million in the city of Salem. Salem Mayor Kimberley Driscoll '89 is an alumna, and the university and city enjoy a very close working relationship.



About the City of Salem

Founded in 1629, Salem, the “City of Peace”, is a small city with a big history. It is the second incorporated city in Massachusetts (April, 1836) and the second oldest settlement in New England (settled four years before the settlement of Boston).

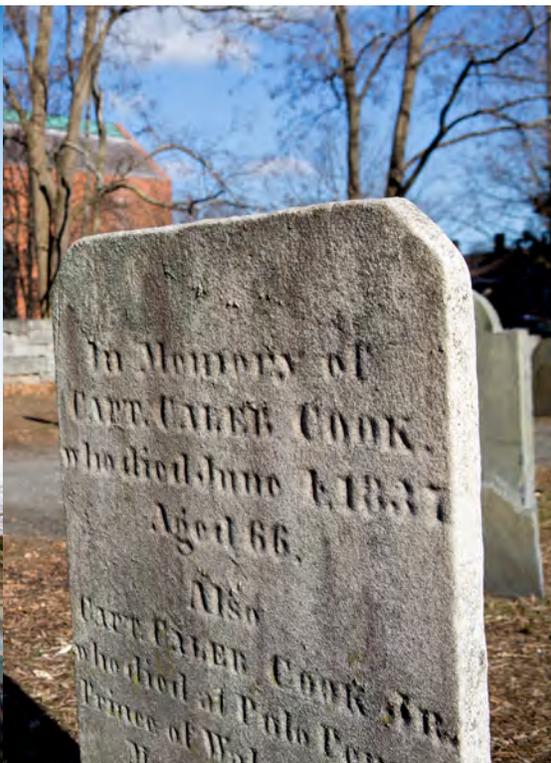
While Salem has been long known as the “Witch City” due to the notable witch trials of 1692, Salem also played a prominent part in Revolutionary times and was an active leader of several Massachusetts industries. In the early part of the 19th century, Salem’s ships were pioneers in the India trade and opened up commerce with Africa, China, Russia, Japan and Australia. In Salem are found mansions that belonged to some of the country’s first millionaires, the birthplace of celebrated author Nathaniel Hawthorne and 18.5 miles of tidal shoreline.

Salem is a vibrant, pedestrian-friendly city where its residents, and over a million tourists annually, can easily visit historic architecture, unique attractions, world famous museums, and an eclectic mix of shops and dining options. And, with easy access to public transportation—including direct access to Boston—Salem is a great city in which to live, work and study.

The university is located in the region of Salem known as South Salem and has strong ties to its neighborhood. After the purchase of the parcel now known as the Canal Street parking lot, the city’s mayor with the agreement of the university president re-established the Salem State University Neighborhood Advisory Committee (SSUNAC). The SSUNAC includes the city councilors serving South Salem, and representatives of the university and neighbors. The group meets monthly to update the community on work of the university and to discuss/ receive input into campus development. Additionally, the current president has regular meetings with the elected leadership of the city. The current process of communication has proved very beneficial in furthering the goal of the university to remain a good neighbor within its neighborhood.

The city, a leader in inclusiveness, has an active No Place For Hate Committee that includes members from the university community. The committee is dedicated to promoting acceptance of diversity and combating discrimination. It is dedicated to mobilizing citizens to challenge bigotry and to promote a prejudice-free community in which all people are respected, understood and appreciated for their differences. Their primary goal is to be a resource to the city of Salem by providing support and education on diversity issues. They seek to protect the promise of equal justice and civil rights for all members of the community.

Furthering its commitment to social justice, the Salem Award for Human Rights and Social Justice was established in 1992, the tercentenary of the Salem Witch Trials. The Salem Award Foundation’s mission is to recognize, honor and perpetuate the commitment to social justice and human rights of individuals and organizations whose work is proven to have alleviated discrimination or promoted tolerance. The university president serves as honorary co-chair of this award committee along with the mayor of the city.



Procedure for Candidacy

Interested candidates should review the Massachusetts Board of Higher Education Guidelines and Procedures for the Search, Selection, Appointment and Removal of State University and Community College Presidents. The Presidential Search Committee will preliminarily screen all applicants and recommend three to five finalists for further vetting by the Salem State University Board of Trustees and the Massachusetts Department of Higher Education. Finalists will be asked to participate in open campus meetings in May 2017. Final appointment is subject to background check and approval by the Massachusetts Board of Higher Education. The president is expected to begin on July 1, 2017.

Confidential inquiries, nominations, and applications are invited. Review of applications will begin immediately and continue until the position is filled. For best consideration, candidates should provide no later than March 31, 2017, a resume or CV, letter of application and the names and contact information of five references. References will not be contacted without prior knowledge and approval of candidates. These materials should be sent electronically via email to Salem State University's consultant, Lucy Leske, at SalemStatePres@wittkiewfer.com

Material that cannot be emailed may be sent to:

**President
Salem State University**

C/O WITT/KIEFFER

Attention: Lucy Leske
2015 Spring Road, Suite 510
Oak Brook, Illinois 60523

Confidential inquiries and questions concerning this search may be directed to 630.575.6122.

SALEM STATE UNIVERSITY IS AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER.
PERSONS OF COLOR, WOMEN AND PERSONS WITH DISABILITIES ARE STRONGLY URGED TO APPLY.

The material presented in this leadership profile should be relied on for informational purposes only. This material has been copied, compiled, or quoted in part from Salem State University documents and personal interviews and is believed to be reliable. While every effort has been made to ensure the accuracy of this information, the original source documents and factual situations govern.

All images and logos used in this leadership profile were provided by Salem State University.

WITT / KIEFFER
Leaders Connecting Leaders

Prepared by

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Alexis von Kunes Newton
February 2017

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352 Lafayette Street
Salem, MA 01970





Inauguration Address

John D. Keenan, JD

January 19, 2018

Governor Baker and members of his esteemed cabinet; Speaker Robert DeLeo and former colleagues of the Great and General Court; Senator Joan Lovely and Representative Paul Tucker; Mayor Kimberley Driscoll and elected officials of Salem; Commissioner Carlos Santiago; my fellow state university presidents; and to the representatives from other academic institutions - thank you for being here today.

Thank you Chair Mattera and the Salem State Board of Trustees for supporting my appointment to the presidency. Thank you to the inauguration committee for undertaking the planning of today's event. Thank you to my inspiring predecessor Patricia Maguire Meservey who gave me the opportunity to come to Salem State in 2014. Thank you to the entire campus community, students, faculty and staff, for giving me a reason to come to work every day. And to the greater community gathered here, thank you for joining us and welcome to Salem State University.

Thank you all for sharing this special moment for our institution and for my family. Without question, this will rank as one of the top moments in my life – right up there with my wedding day, the days my children were born and my first time being sworn in as state representative.

I stand before you in awe of the incredible responsibility and opportunity I have been offered. Though many have walked this campus, few have had the honor of leading it.

And as I think about the honor it is to shepherd this university into the next decade and perhaps beyond, I think about what made it possible for me to get to this point. The answer, undoubtedly, is education. My education – and the confidence to obtain it – have made all the difference in my life. I firmly believe the famous words of Horace Mann – education is the great equalizer.

It's easy for this to get lost in the day-to-day routine on campus, but we must remember that through our work at Salem State, we are fighting for equality. We are promoting democracy. We are advancing social justice. We know that when it comes to education, access alone is often not enough. True success requires a community that believes in you.

I have been blessed to have mentors, teachers, coaches, friends, classmates, roommates, colleagues, and family who have shaped me into the man standing before you today as the 14th president of Salem State University. The cliché goes: it takes a village to raise a child. My village has been this great community of Salem.

Our students find that village here at Salem State. We are the community that guides them. The support that propels them. And the voice that tells them they can. To those of you who work every day to be that community, thank you.

The only greater honor than being on this stage is working with you to be part of the solution. At Salem State, we not only advance equality by providing an excellent education, but we teach the values that lead to progress. We teach students to think critically and to question the status quo. We foster an environment that encourages activism.

Indeed, it is a unique time to be in America as a student and a university president. Our country is experiencing a time of change, disruption, and division that has not been seen for decades.

In protests and demonstrations that harken back to the sixties, students are challenging campus administrators every day –taking a stand, voicing their opinions, speaking out against racism and sexual assault and for free speech and inclusion.

Divisiveness threatens to, and sometimes succeeds in, tearing apart campuses. We think back to the anti-Semitic chants shouted at Charlottesville, the punches thrown at Middlebury, and to the vandalism that occurred on our very own campus last semester and this week. Although these heinous crimes succeed in putting the worst of society on display, they also open a discussion to begin to heal and tackle racism on campuses across this nation.

While the conversation at Salem State will never be over, I can say we are making progress. We will have this conversation and take action for as long as we must to ensure every student and member of the faculty and staff feels safe and welcome on our campus. We need to ensure that every student at our university, regardless of race, sexual orientation, gender, abilities, beliefs, and socioeconomic status feels at home at Salem State.

We often and rightly boast about being the most diverse of the state universities. It is important to be proud of this distinction and strive towards remaining so, however, we must be as inclusive as we are diverse.

Our students and faculty come from different backgrounds and have a variety of opinions. We want our campus to continue to debate the difficult issues of the day, to vote in local and national elections, and to tell their stories.

Being in Salem, we have a wonderful opportunity to be connected to our community and our history. Our students are extremely fortunate to be studying in a city that is welcoming to all creeds of people. Salem, however, also gave us one of the most significant periods of darkness in our nation's history.

As a descendent of Rebecca Nurse, one of the women convicted and hanged for witchcraft in 1692, and being trained as a lawyer, I am sensitive to the need to provide adequate due process and to fight for social justice. I have dedicated my life to public service in many instances fighting for social justice – whether for marriage equality, transgender rights, or in-state tuition for “dreamers”.

I think of people like Rebecca Nurse and find it is my duty to be the voice of those who cannot speak out for themselves and to advocate for those who need someone in their corner. I brought this commitment with me to Salem State where I promise to do the same for our students.

As I begin my presidency, I wish to share with all of you gathered here today and with the entire campus the vision I have for this institution.

It consists of three primary components – academic excellence, student success, and capital improvements.

The success of our academic programs relies on our faculty to continue to provide exceptional education to our undergraduate and graduate students.

The Bertolon School of Business has been working diligently on achieving accreditation. We are hopeful that we will prevail during this rigorous process to be amongst only five percent of the world's business schools to be accredited by AACSB.

And in occupational therapy, it was recently mandated that the entry level degree for an occupational therapist will be a doctorate by 2027, we will pursue a clinical doctorate in occupational therapy to ensure the continuation of our program. This will be the first time a Massachusetts State University has applied for a doctoral program.

Salem State has long had a commitment to the sciences. With the top workforce needs of the North Shore in the biotech and healthcare fields, we will remain a leader in preparing students for careers in these important industries.

Beginning as a Normal School, Salem State has always had a foundation in the education of America's teachers. We will stay true to these values and continue to build important partnerships with our local community, preparing teachers and academic administrators.

Over the next decade, we will strive to build upon the student success gained during Dr. Meserve's tenure: we will increase the six-year graduation rate from 52 to 65 percent while also eliminating all achievement gaps. We will grow enrollment by some 2000 students either on campus or virtually.

As we look at the landscape of the North Shore, we recognize that the Hispanic population is the fastest growing. By the shift in demographics, Salem State will likely soon become a Hispanic Serving Institution, with 25 percent of our students identifying as Hispanic. While Salem State would be proud to become the first state university to receive this designation, we must have the resources in place to ensure the success of all incoming students.

As we have already seen our efforts come to fruition, with the Education Trust recently placing us on the list of top 10 schools nationwide for Latino student success, we know it is our duty to increase our efforts.

We are committed to ensuring the success of our Latino students as well as our entire student body.

And over the next decade, I hope to give the opportunity of a college education to the students who live in our own backyard who come from challenging economic backgrounds. The children of Rainbow Terrace and Salem who grow up next door to Salem State deserve the opportunity to thrive at our institution.

Today, I announce the formation of the Dream Scholarship which will provide funding to children of Salem who lack the means to have access to a college education. Donations for this inauguration will begin that fund.

At the heart of our institution is a commitment to fighting for social justice, addressing public issues, and connecting to the greater community. It is our commitment to civic engagement.

As we become a regional leader in civic engagement, we will strive towards Carnegie Classification, a national recognition of our commitment and strong bond between campus and community.

To fulfill the dreams of our students and realize many of the goals I set forth today, we will undertake a comprehensive campaign to rival our recently completed 10,000 Reasons Campaign which raised over 26 million dollars. As state universities must become more self-reliant, I hope to increase our efforts and at least double that total in our next campaign.

We must not only grow our student body and increase student success; we must build the facilities needed to achieve the same in the 21st century.

Many of our past presidents have focused on the physical development of our campus, with some of the most significant changes taking place under the leadership of Presidents Keegan, Meier, Harrington and, most recently, Meservey. They gave us some of our most recognized facilities. We will build on that momentum and legacy.

Because of this growth, Salem State has long been identified as three campuses. It is time to bring us together. During my tenure, I hope to create a centralized, consolidated, single campus. No longer will we be identified or represented by North, South and Central, we will become one Salem State campus.

Without question, our top capital priority is the Science Teaching Laboratory Addition which will meet the work force needs of the region. It is imperative that this facility match the excellence of our faculty and academic programs and enables our planned enrollment growth.

As we work to grow our enrollment by 2,000 students over the next decade, there will be a need for additional housing. We will likely need to build two new residence halls to house the influx of students coming to campus as well as meeting our current demand.

Finally, I will continue our advocacy for a commuter rail station within steps of campus. This will not only continue our mission of environmental sustainability, it will increase access from areas throughout the North Shore and beyond. I very much appreciate Mayor Driscoll's efforts on this front.

Now that I have shared some of my major goals, please allow me a minute, to take a breath, and appreciate this incredible moment.

I stand before you today on January 19, 2018 and cannot believe I take the stage to be sworn in as Salem State's 14th president, an honor held by only 13 others in this school's 164-year history. Moreover, with our early leaders forgoing the inauguration ceremony, the number of presidential inaugurations is even fewer with only eight such ceremonies in our history.

This is quite a feeling – almost surreal. I am humbled, honored, thrilled, but above all, ready.

This is unquestionably the capstone of my career in public service. While I've served as prosecutor, solicitor, and legislator, I would not want to spend the remainder of my career doing anything else but helping our students be successful at Salem State and beyond.

Like a third of our Salem State students, I am a first-generation college student. My mother dropped out of high school to marry my father and raise a family. My father worked at a local leather factory, Flynn Tan, like his father before him. I am a proud product of Salem Public Schools - some of my teachers and coaches join us here today. My parents encouraged my siblings and me to go to college to better ourselves and instilled in us a confidence that we could succeed.

I worked hard in high school and with the relentless advocacy by local dentist Don Sadowski, somehow got into Harvard. I took some time after college working before choosing to attend Suffolk Law with encouragement from my mentor and legal titan of Salem, Judge Sam Zoll.

Though I earned a terminal degree, I did not follow a traditional academic route to the presidency and, for many during my confirmation process, this was a concern. The criticism I faced during my selection process did not dishearten me; it inspired me.

The faculty, staff, and students that spoke out against my selection proved that at Salem State, we are passionate about the education we provide to our students and rightfully hold our leaders to the highest standards.

In many ways, I believe my selection as the 14th president was an acknowledgement of a disruption and shift in higher education leadership in the 21st century. Every university board is looking for a president that brings a unique skill-set to compete in an ever-shifting landscape.

There is a quote from one of our most noted alumna, Charlotte Forten, our first African American graduate, that speaks to why I wanted to become president. It says, “I came not here for friendly sympathy or for anything else but to work and to work hard. Let me do that faithfully and well.”

My children will tell you we have only two rules in our house: “try your hardest” and “be polite”. During my time as president, I will do nothing but that. I will work hard every day to make this university the best it can be.

I also implore my children and our students to get up when they are knocked down. Resilience is critical for success in life.

This applied to me quite literally when I was in high school. As a freshman wrestler, I lost my first match in 19 seconds. I got back up and fought my way through to my senior year when I finished the season undefeated in dual meets. And similarly, while seeking elective office, I lost twice before finally winning.

Life is not easy. It’s about choices, perseverance, and hard work. To my children and our students, I say “do not let criticism or failure hold you from your goals.”

I never would have attained this goal if not for many supporters along the way. Calling this city home for over half a century – I am an extremely proud and grateful son of Salem.

To my mentors, coaches, teachers, college roommates, and law school classmates... this whole community really, I say thank you. I couldn’t have made it here without your challenging me to be my very best.

To my father, who taught me the value of hard work. To my mother who died in 1994, who taught me about commitment. To my older brother and sister, I couldn’t have chosen two more supportive siblings and lifelong friends. To my children who are growing up way too fast, you awe me every day with your zest for life and individuality. And to my wife Kara who married me even though I brought nothing to the marriage but my \$54,000 in law school debt, and who has been a supportive partner in everything I set out to do, know you taught me the importance of balance in life.

I stand before you a proud husband, father, son, brother, and friend – and today, officially the 14th President of Salem State University.

I'll end here with a look to the future. As I mentioned earlier, 2018 is a unique, tumultuous time. As we begin the year and I begin the presidency, I reflect on the world our students are experiencing and the world they can shape.

Survival of our democracy requires respect for civic engagement and disagreement. Indeed, the essence of our academic mission – seeking truth through rigorous research – is fueled by disagreement and question.

Seeking truth has been one of the pillars of my career. As a former prosecutor, I always found that there was no better satisfaction than the cross examination of a witness. Seeking the truth fueled my zeal for the work.

Students, I urge you to find something that propels you through life as public service has for me. Find your passion and purpose.

For our faculty, their academic freedom fuels their work. They conduct research and facilitate conversations that allow them to seek similar truths and share those truths with our students and with the world. I am convinced society needs education today more than ever so future generations can debate robustly and civilly the important issues of the day.

One of the greatest leaders of our time, Nelson Mandela, said “Education is the most powerful weapon you can use to change the world”.

As a university, we have the tremendous opportunity to inspire change by educating our students who will go on to shape and mold the world in ways we cannot imagine. I know we have the will, the talent – and the persistence to succeed in the work ahead.

We are up for the task.

Let us begin.



Rankin & Associates, Consulting

Assessment • Planning • Interventions

Salem State
University

Assessment of
Campus Climate
Executive Summary

October 24, 2017



Rankin & Associates, Consulting

Executive Summary

Introduction: History of the Project

Salem State University affirms that diversity and inclusion are crucial to the intellectual vitality of the campus community and they engender academic engagement where teaching, working, learning, and living take place in pluralistic communities of mutual respect. Free exchange of different ideas and viewpoints in supportive environments encourage students, faculty, and staff to develop the critical thinking and citizenship skills that will benefit them throughout their lives.

Salem State University is committed to fostering a caring community that provides leadership for constructive participation in a diverse, multicultural world. As noted in Salem State's mission statement, "Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society...."¹ To better understand the campus climate, the senior administration at Salem State recognized the need for a comprehensive tool that would provide campus climate metrics for the experiences and perceptions of its students, faculty, and staff. During the spring 2017 semester, Salem State conducted a comprehensive survey of all students, faculty, and staff to develop a better understanding of the learning, living, and working environment on campus.

In February 2016, members of Salem State University formed the Climate Study Working Group (CSWG). The CSWG was composed of faculty, staff, students, and administrators. Ultimately, Salem State contracted with Rankin & Associates Consulting (R&A) to conduct a campus-wide study entitled, "Salem State University Assessment of Climate for Learning, Working, and Living." Data gathered via reviews of relevant Salem State literature, campus focus groups, and a campus-wide survey addressing the experiences and perceptions of various constituent groups will be presented at community forums, which will develop and complete two or three action items by fall 2017.

¹<https://www.salemstate.edu/salem-state-difference/mission-vision-and-strategic-plan>

Project Design and Campus Involvement

The conceptual model used as the foundation for Salem State's assessment of campus climate was developed by Smith et al. (1997) and modified by Rankin (2003). A power and privilege perspective informs the model, one grounded in critical theory, which establishes that power differentials, both earned and unearned, are central to all human interactions (Brookfield, 2005). Unearned power and privilege are associated with membership in dominant social groups (Johnson, 2005) and influence systems of differentiation that reproduce unequal outcomes. Salem State's assessment was the result of a comprehensive process to identify the strengths and challenges of campus climate, with a specific focus on the distribution of power and privilege among differing social groups. This report provides an overview of the results of the campus-wide survey.

The Climate Study Working Group (CSWG) collaborated with R&A to develop the survey instrument. Together, they implemented participatory and community-based processes to review tested survey questions from the R&A question bank and develop a survey instrument for Salem State University that would reveal the various dimensions of power and privilege that shape the campus experience. In the first phase, R&A planned 17² focus groups, which were composed of 103 participants (39 students; 64 faculty and staff). In the second phase, the CSWG and R&A used data from the focus groups to co-construct questions for the campus-wide survey. The final Salem State survey queried various campus constituent groups about their experiences and perceptions regarding the academic environment for students, the workplace environment for faculty and staff, employee benefits, sexual harassment and sexual violence, racial and ethnic identity, gender identity and gender expression, sexual identity, accessibility and disability services, and other topics.

In total, 3,086 people completed the survey. In the end, the University's assessment was the result of a comprehensive process to identify the strengths and challenges of campus climate,

²²Although 17 groups were planned, 16 were conducted. Owing to a miscommunication regarding the time of the Veteran Students group, it was not held. Attempts to reschedule the group on the same day were not successful. An email with focus group questions was sent to Veteran student participants by the R&A lead facilitator with no response. Communications between R&A and the CSWG led to the planning of two additional focus groups to be conducted during the week of November 7th via telephone. These groups targeted Veteran Students and International Students.

with a specific focus on the distribution of power and privilege among differing social groups at Salem State.

Salem State University Participants

Salem State University community members completed 3,086 surveys for an overall response rate of 31%. Only surveys that were at least 50% completed were included in the final data set for analyses.³ Sixty-two percent ($n = 1,920$) were Undergraduate Students, 11% ($n = 325$) were Graduate Students, 7% ($n = 201$) were Staff, 8% ($n = 247$) were Administrators, and 13% ($n = 393$) were Faculty. Table 1 provides a summary of selected demographic characteristics of survey respondents. The percentages offered in Table 1 are based on the numbers of respondents in the sample (n) for each demographic characteristic.⁴

³Seventy-three surveys were removed because they did not complete at least 50% of the survey, and 32 duplicate submissions were removed. Surveys were also removed from the data file if the respondent did not provide consent ($n = 176$). Any additional responses were removed because they were judged to have been problematic (i.e., the respondent did not complete the survey in good faith).

⁴The total n for each demographic characteristic may differ as a result of missing data.

Table 1. Salem State University Sample Demographics

		Undergraduate Student		Graduate/Prof Student		Faculty		Administrator		Staff		Total	
		n	%	n	%	n	%	n	%	n	%	n	%
Gender identity ⁵	Woman	1,371	71.41	247	76.00	242	61.58	151	61.13	112	55.72	2,123	68.79
	Man	489	25.47	74	22.77	139	35.37	87	35.22	77	38.31	866	28.06
	Transpectrum/ Multiple/Other	52	2.71	<5	---	5	1.27	<5	---	0	0.00	63	2.04
	Missing	8	0.42	<5	---	7	1.78	6	2.43	12	5.97	34	1.10
Racial identity	Asian/Asian American	67	3.49	15	4.62	16	4.07	5	2.02	<5	---	105	3.40
	Latin@/Chican@/ Hispanic	242	12.60	21	6.46	16	4.07	5	2.02	23	11.44	307	9.95
	Black/African American	197	10.26	20	6.15	18	4.58	13	5.26	9	4.48	257	8.33
	White	1,197	62.34	247	76.00	296	75.32	198	80.16	129	64.18	2,067	66.98
	Multiracial	167	8.70	13	4.00	16	4.07	12	4.86	7	3.48	215	6.97
	Other Person of Color	15	0.78	<5	---	5	1.27	<5	---	<5	---	28	0.91
	Missing/Unknown/ Other	35	1.82	5	1.54	26	6.62	12	4.86	29	14.43	107	3.47
Sexual identity	LGBQ ⁶	358	18.65	50	15.38	51	12.98	31	12.55	11	5.47	501	16.23
	Heterosexual	1,456	75.83	263	80.92	317	80.66	200	80.97	155	77.11	2,391	77.48
	Missing/Other/ Asexual	106	5.52	12	3.69	25	6.36	16	6.48	35	17.41	194	6.29

Note: The total n for each demographic characteristic may differ as a result of missing data.

⁵ Transpectrum is a re-coded variable collapsing the response choices on the survey of Genderqueer, Transgender, and any write-in responses that were outside the gender binary of "man" or "woman".

⁶ LGBQ is a re-coded variable collapsing the response choices on the survey of Bisexual, Gay, Lesbian, Pansexual, Queer, Questioning, and any write-in responses that were not "heterosexual".

Key Findings – Areas of Strength

1. High levels of comfort with the climate at Salem State University

Climate is defined as the “current attitudes, behaviors, and standards of employees and students concerning the access for, inclusion of, and level of respect for individual and group needs, abilities, and potential.”⁷ The level of comfort experienced by faculty, staff, and students is one indicator of campus climate.

- 75% ($n = 2,407$) of the survey respondents were “very comfortable” or “comfortable” with the climate at Salem State University.
- 74% ($n = 619$) of Faculty and Staff/Administrator respondents were “very comfortable” or “comfortable” with the climate in their departments/work units.
- 83% ($n = 2,178$) of Student and Faculty respondents were “very comfortable” or “comfortable” with the climate in their classes.

2. Faculty Respondents – Positive attitudes about faculty work

- 80% ($n = 311$) of Faculty respondents felt valued by their department/program chairs.
- 68% ($n = 261$) of Faculty respondents felt valued by other faculty at Salem State.
- 89% ($n = 338$) of Faculty respondents felt valued by students in the classroom.
- 74% ($n = 284$) of Faculty respondents “strongly agreed” or “agreed” that their teaching was valued.
- Only 20% ($n = 76$) of Faculty respondents “strongly agreed” or “agreed” that faculty in their departments/programs prejudged their abilities based on their perception of their identity/background.
- 13% ($n = 51$) of Faculty respondents thought that their department/program chairs prejudged their abilities.

⁷Rankin & Reason, 2008, p. 264

3. Staff/Administrator Respondents –Positive attitudes about work

- 63% ($n = 281$) of Staff/Administrator respondents “strongly agreed” or “agreed” that they had supervisors who gave them job/career advice or guidance when they needed it.
- 71% ($n = 309$) of Staff/Administrator respondents believed that their supervisors provided adequate support for them to manage work-life balance.
- 26% ($n = 112$) of Staff/Administrator respondents “strongly agreed” or “agreed” that they were burdened by work responsibilities beyond those of their colleagues with similar performance expectations.
- 69% ($n = 299$) of Staff/Administrator respondents believed that they were given a reasonable time frame to complete assigned responsibilities.
- 63% ($n = 278$) of Staff/Administrator respondents would recommend Salem State as a good place to work.
- 64% ($n = 281$) of Staff/Administrator respondents “strongly agreed” or “agreed” that they had job security.

4. Student Respondents – Positive attitudes about academic experiences

The way students perceive and experience their campus climate influences their performance and success in college.⁸ Research also supports the pedagogical value of a diverse student body and faculty for improving learning outcomes.⁹ Attitudes toward academic pursuits are one indicator of campus climate.

All Student respondents

- 72% ($n = 1,612$) of Student respondents felt valued by Salem State faculty.
- 68% ($n = 1,520$) of Student respondents felt valued by Salem State staff.
- 50% ($n = 1,121$) of Student respondents felt valued by Salem State senior administrators.
- 69% ($n = 1,549$) of Student respondents believed that the campus climate encourages free and open discussion of difficult topics.

⁸Pascarella & Terenzini, 2005

⁹Hale, 2004; Harper & Hurtado, 2007; Harper & Quaye, 2004

- 71% ($n = 1,589$) of Student respondents indicated that they have faculty whom they perceive as role models.

Graduate and Professional Student respondents

- 68% ($n = 219$) of Graduate Student respondents “strongly agreed” or “agreed” that they were satisfied with the quality of advising they had received from their departments.
- 74% ($n = 240$) of Graduate Student respondents felt they had adequate access to their advisors.
- 71% ($n = 229$) of Graduate Student respondents believed that their advisors provided clear expectations.
- 81% ($n = 263$) of Graduate Student respondents felt comfortable sharing their professional goals with their advisors.

Student Respondents *Perceived Academic Success*

A confirmatory factor analysis was conducted on the scale, *Perceived Academic Success*, derived from Question 11 on the survey. Analyses using this scale revealed:

- A significant difference existed in the overall test for means for Students by sexual identity and disability status for Undergraduate Student respondents on *Perceived Academic Success*. No significant differences existed for Graduate Student respondents.
- LGBQ Undergraduate Student respondents had a lower *Perceived Academic Success* score than Heterosexual Undergraduate Student respondents.
- The Undergraduate Student respondents who indicated No Disability had a higher *Perceived Academic Success* score than Single Disability Undergraduate Student respondents and Multiple Disabilities Undergraduate Student respondents.

Key Findings – Opportunities for Improvement

1. Members of several constituent groups indicated that they experienced exclusionary, intimidating, offensive, and/or hostile conduct.

Several empirical studies reinforce the importance of the perception of non-discriminatory environments for positive learning and developmental outcomes.¹⁰

Research also underscores the relationship between workplace discrimination and subsequent productivity.¹¹ The survey requested information on experiences of exclusionary, intimidating, offensive, and/or hostile conduct.

- 17% ($n = 528$) of respondents indicated that they personally had experienced exclusionary, intimidating, offensive, and/or hostile conduct.¹²
 - 22% ($n = 118$) noted that the conduct was based on their gender/gender identity, 19% ($n = 101$) felt that it was based on their position status, and 19% ($n = 95$) felt that it was based on their ethnicity.
- Differences emerged based on gender/gender identity, position status, and racial identity:
 - By gender identity, a higher percentage of Transpectrum respondents (35%, $n = 22$) than Women respondents (17%, $n = 365$) or Men respondents (15%, $n = 131$) indicated that they had experienced exclusionary, intimidating, offensive, and/or hostile conduct.
 - 41% ($n = 9$) of Transpectrum respondents, compared with Women respondents 18% ($n = 66$) and 15% ($n = 20$) of Men respondents who noted they had experienced exclusionary, intimidating, offensive, and/or hostile conduct indicated the conduct was based on their gender identity.
 - By position status, 25% ($n = 97$) of Faculty respondents, 23% ($n = 46$) of Staff respondents, 22% ($n = 54$) of Administrator respondents, 11% ($n =$

¹⁰Aguirre & Messineo, 1997; Flowers & Pascarella, 1999; Pascarella & Terenzini, 2005; Whitt, Edison, Pascarella, Terenzini, & Nora, 2001

¹¹Silverschanz, Cortina, Konik, & Magley, 2008; Waldo, 1999

¹²The literature on microaggressions is clear that this type of conduct has a negative influence on people who experience the conduct, even if they feel at the time that it had no impact (Sue, 2010; Yosso, Smith, Ceja, & Solórzano, 2009).

37) of Graduate Student respondents, and 15% ($n = 294$) of Undergraduate Student respondents believed that they had experienced exclusionary conduct.

Of those respondents who noted they had experienced exclusionary conduct, a higher percentage of Staff respondents (52%, $n = 24$) and Administrator respondents (44%, $n = 24$) thought that the conduct was based on their position status, compared with Faculty respondents (19%, $n = 18$), Undergraduate Student respondents (11%, $n = 33$), and Graduate Student respondents ($n < 5$).

- o By racial identity, significant differences emerged with White respondents (16%, $n = 320$) indicating that they had experienced exclusionary, intimidating, offensive, and/or hostile conduct within the past year less than Multiracial Respondents (21%, $n = 46$) and Respondents of Color (19%, $n = 135$).

Of those respondents who reported experiencing this conduct, higher percentages of Multiracial Respondents (28%, $n = 13$) and Respondents of Color (43%, $n = 58$) than White respondents (7%, $n = 21$) believed the conduct was based on their race.

Respondents were offered the opportunity to elaborate on their experiences of exclusionary, intimidating, offensive, and/or hostile conduct at Salem State University. Fifty-four students, faculty, and staff contributed comments regarding their personal experiences. Twenty-five respondents elaborated on the types of disrespectful conduct that they reported. Forty-eight respondents described a lack of follow-through after reporting.

2. Several constituent groups indicated that they were less comfortable with the overall campus climate, workplace climate, and classroom climate.

Prior research on campus climate has focused on the experiences of faculty, staff, and students associated with historically underserved social/community/affinity groups (e.g.,

women, People of Color, people with disabilities, first-generation students, veterans).¹³

Several groups at Salem State indicated that they were less comfortable than their majority counterparts with the climates of the campus, workplace, and classroom.

- By racial identity: a significantly smaller proportion of Respondents of Color (47%, $n = 327$) were “comfortable” with the overall climate at Salem State than were White respondents (53%, $n = 1,102$). A higher percentage of White Faculty and Student respondents (30%, $n = 522$) were “very comfortable” with the climate in their classes than were Faculty and Student Respondents of Color (23%, $n = 145$).
- By sexual identity: a smaller percentage of LGBTQ respondents (22%, $n = 99$) felt “very comfortable” with the overall climate than Heterosexual respondents (30%, $n = 603$).
- By disability status: a higher percentage of No Disability respondents (25%, $n = 633$) than Respondents with a Single Disability (19%, $n = 62$) were “very comfortable” with the overall climate. A higher percentage of respondents with No Disability (30%, $n = 635$) than respondents with a Single Disability (21%, $n = 62$) and respondents with Multiple Disabilities (21%, $n = 37$) were “very comfortable” with the classroom climate.

3. Faculty and Staff/Administrator Respondents – Challenges with work-life issues

- 46% ($n = 182$) of Faculty respondents, 42% ($n = 82$) of Staff respondents, and 56% ($n = 137$) of Administrator respondents had seriously considered leaving Salem State in the past year.
 - 47% ($n = 187$) of those Faculty, Staff, and Administrator respondents who seriously considered leaving did so because of limited opportunities for advancement.
 - 45% ($n = 179$) of Faculty, Staff, and Administrator respondents each indicated that they did so because of lack of instructional support and/or low salary/pay rate.

¹³Harper & Hurtado, 2007; Hart & Fellabaum, 2008; Norris, 1992; Rankin, 2003; Rankin & Reason, 2005; Worthington, Navarro, Loewy, & Hart, 2008

- By faculty status: 54% ($n = 122$) of Tenure/Tenure-Track Faculty respondents and 36% ($n = 55$) of Adjunct Faculty respondents seriously considered leaving Salem State.
- By staff status: 50% ($n = 63$) of AFSCME Staff respondents and 27% ($n = 19$) of NUC/Chartwells/Contract Staff respondents seriously considered leaving Salem State.
- By citizenship status: 49% ($n = 349$) of U.S. Citizen Employee respondents and 38% ($n = 41$) of Not-U.S. Citizen Employee respondents seriously considered leaving Salem State.
- By religious/spiritual identity: Employee respondents with No Religious/Spiritual Identity (54%, $n = 145$) and Christian Employee respondents (41%, $n = 157$) seriously considered leaving Salem State. Employee respondents with Multiple Religious/Spiritual Identities (55%, $n = 24$) and Employee respondents with Additional Religious/Spiritual Identities (46%, $n = 38$) were not statistically different from the other two groups.

4. Faculty Respondents – Challenges with faculty work

- 21% ($n = 81$) of Faculty respondents thought that salaries for tenure-track faculty positions were competitive and 19% ($n = 70$) thought that salaries for adjunct/full-time temporary professors were competitive.
- 8% ($n = 31$) of Faculty respondents “strongly agreed” or “agreed” that child care benefits were competitive.
- 32% ($n = 72$) of Tenured and Tenure-Track Faculty respondents thought that tenure standards/promotion standards were applied equally to faculty in their schools/division and 14% ($n = 31$) of Tenured and Tenure-Track Faculty respondents believed that Salem State faculty who would benefit from delaying their tenure-clock felt empowered to do so.
- 19% ($n = 42$) of Tenured and Tenure-Track Faculty respondents believed that faculty opinions were taken seriously by senior administrators.

- 25% ($n = 43$) of Non-Tenure-Track Faculty respondents “strongly agreed” or “agreed” that the criteria used for contract renewal was applied equally to all positions.
- 28% ($n = 44$) of Non-Tenure-Track Faculty respondents felt that their academic advising was valued.
- 32% ($n = 52$) of Non-Tenure-Track Faculty respondents felt that their opinions were taken seriously by senior administrators (e.g., chair, dean, provost).
- 15% ($n = 24$) of Non-Tenure-Track Faculty respondents “strongly agreed” or “agreed” that they have job security.

Ninety-Six Staff/Administrator respondents contributed comments regarding their employment-related experiences. Three themes emerged from these comments: 1) lack of advancement opportunities and professional development, 2) salary imbalances and workload, and 3) short-comings of leadership,

When asked to elaborate on their responses, Tenured and Tenure-Track Faculty respondents noted inconsistent expectations in service and inclusion concerns based on race and sexuality. Non-Tenure-Track Faculty respondents described concerns with job security and a low sense of belonging. Faculty respondents, in general, described challenges with funding for research and professional development, as well as, dissatisfaction with their salaries.

5. A small, but meaningful, percentage of respondents experienced unwanted sexual conduct.

In 2014, *Not Alone: The First Report of the White House Task Force to Protect Students from Sexual Assault* indicated that sexual assault is a substantial issue for colleges and universities nationwide, affecting the physical health, mental health, and academic success of students. One section of the Salem State survey requested information regarding sexual assault.

- Two hundred and forty (8%) respondents indicated that they had experienced unwanted sexual conduct while at Salem State.

- 1% ($n = 39$) of respondents experienced relationship violence (e.g., ridiculed, controlling, hitting) while a member of the Salem State community.
- 2% ($n = 71$) of respondents experienced stalking (e.g., physical following, on social media, texting, phone calls) while a member of the Salem State community.
- 5% ($n = 142$) of respondents experienced unwanted sexual interaction (e.g., cat-calling, repeated sexual advances, sexual harassment) while a member of the Salem State community.
- 2% ($n = 53$) of respondents experienced unwanted sexual contact (e.g., fondling, rape, sexual assault, penetration without consent) while a member of the Salem State community.
- Over half of the Undergraduate Student respondents who had indicated they had experienced unwanted sexual conduct of any type reported that it occurred during their first year and often during the first semester.
- Higher percentages of Non-Transfer Student respondents, Women and Transspectrum respondents, LGBQ respondents, U.S. Citizen respondents, Respondents with Multiple Disabilities, Respondents with a Single Disability, and Campus Housing Student respondents reported experiencing unwanted sexual conduct of any type than their colleagues.
- Eighty to ninety percent of respondents who experienced unwanted sexual conduct did not report it.

Respondents were offered the opportunity to elaborate on why they did not report unwanted sexual experiences. Five themes emerged: 1) fear of blame, 2) belief nothing would be done, 3) conduct was insignificant, 4) conduct was significant, but commonplace, and 5) lack of support.

Conclusion

Salem State University climate findings¹⁴ were consistent with those found in other higher education institutions across the country based on the work of R&A Consulting.¹⁵ For example, 70% to 80% of respondents in similar reports found the campus climate to be “comfortable” or “very comfortable.” A similar percentage (75%) of Salem State respondents reported that they were “very comfortable” or “comfortable” with the climate at Salem State. Likewise, 20% to 25% of respondents in similar reports indicated they personally had experienced exclusionary, intimidating, offensive, and/or hostile conduct. At Salem State, a lower percentage of respondents (17%) indicated that they personally had experienced exclusionary, intimidating, offensive, and/or hostile conduct. The results also paralleled the findings of other climate studies of specific constituent groups offered in the literature.¹⁶

Salem State’s climate assessment report provides baseline data on diversity and inclusion and addresses Salem State’s mission and goals. While the findings may guide decision-making in regard to policies and practices at Salem State, it is important to note that the cultural fabric of any institution and unique aspects of each campus’s environment must be taken into consideration when deliberating on additional action items based on these findings. The climate assessment findings provide the Salem State community with an opportunity to build upon its strengths and to develop a deeper awareness of the challenges ahead. Salem State, with support from senior administrators and collaborative leadership, is in a prime position to actualize its commitment to promote an inclusive campus and to institute organizational structures that respond to the needs of its dynamic campus community.

¹⁴Additional findings disaggregated by position status and other selected demographic characteristics are provided in the full report.

¹⁵Rankin & Associates Consulting, 2015

¹⁶Guiffrida, Gouveia, Wall, & Seward, 2008; Harper & Hurtado, 2007; Harper & Quaye, 2004; Hurtado & Ponjuan, 2005; Rankin & Reason, 2005; Sears, 2002; Settle, Cortina, Malley, & Stewart, 2006; Silverschanz et al., 2008; Yosso et al., 2009

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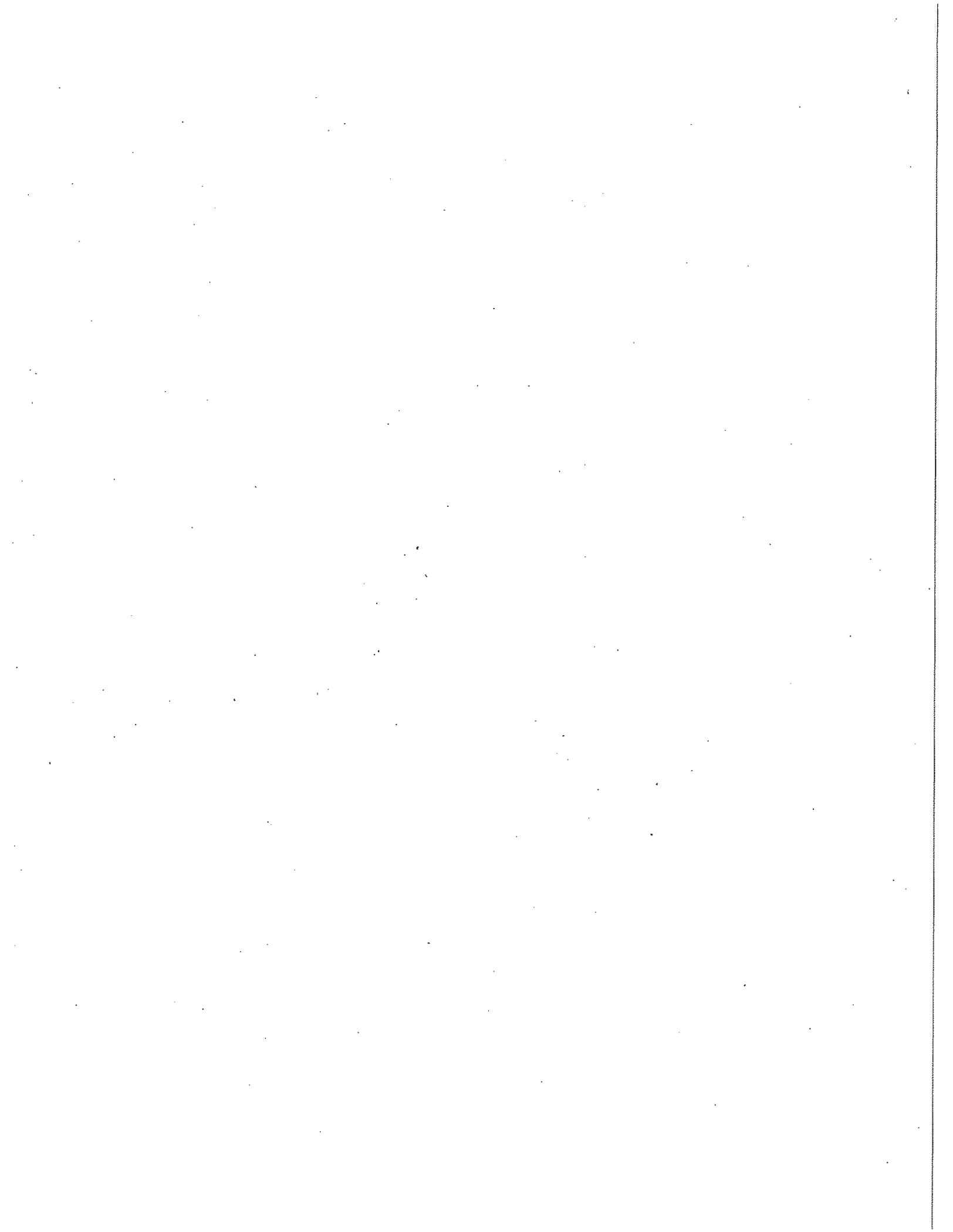
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STRATEGIC PLAN

NOVEMBER 9, 2017

EXECUTIVE SUMMARY

This Salem State University strategic plan concludes a transparent and inclusive campus-wide planning process led by the institution's Collaboration Committee. Through this strategic plan, we affirm the university's mission and vision, and present expanded core values. The university takes pride in our gains towards the Massachusetts Board of Higher Education (BHE) system goals of college participation, college completion, and closing achievement gaps. Of equal importance in accomplishing these goals has been a commitment to authentic teamwork, an openness to sincere dialogue, and the discernment and engagement required to undertake systemic change.

The strategic plan presented in this document builds on these important gains, learns from both successes and failures, is tempered by internal and external realities, and confidently presents bold yet feasible strategic priorities that align with our institution's strengths and the North Shore's and the Commonwealth's educational, economic and workforce needs.

Salem State's four strategic goals are:

Financial Vitality: Strengthen Salem State's financial foundation, align resources with priorities, and foster innovation to drive new revenue streams. Identify and implement additional opportunities to contain, reduce, or avoid future growth in costs. We must continue to work towards establishing a stronger financial base, by strategically growing enrollment, diversifying program delivery, and generating new sources of revenue. Current Business Intelligence efforts will provide the roadmap.

Collaboration, Inclusion and Stewardship: Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship. The pace of change in higher education requires a coordinated, committed and collaborative process of relationship- and trust-building among faculty, staff, students and external partners. The Campus Climate Study¹ results will help guide us.

Academic Excellence: Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society. Our continued successes in academic excellence require support for faculty development in aid of pedagogical and

curricular innovation (including alternative modes of course delivery), as well as greater connection to regional opportunities for experiential learning, continuing scholarship, and civic engagement.

Student Success: Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals. We aim to foster a supportive environment for student growth in the context of the North Shore's shifting demographics and evolving economic trends, with an eye toward providing more nimble responses to the needs of our students and their future employers.

Implementing these four goals will lead to success in these areas:

BHE "Big Three": Salem State University will continue to boost college participation by strategically increasing enrollment, via expanded partnerships and articulations with PK-12 districts and community colleges and strategic growth in regional high-demand academic programs. Similarly, college completion rates will continue to increase due to improved academic advising and student success programming. Moreover, the university will build on its success of closing achievement gaps by focusing resources on the programmatic areas with highest impact.

Inclusive Excellence: Focused attention the principles of inclusive excellence, which promotes a more just and equitable society, supports our institutional mission as operationalized both on our campus and in our region. Moreover, success in achieving the BHE Big Three goals critically depends on a campus climate in which diversity (in its many forms) is acknowledged, valued, celebrated, and integrated into the entire college-going experience. The recommendations from the Campus Climate Study will provide a roadmap to being a welcoming, accessible, student-centered, high-quality academic institution.

Science & Healthcare on a Liberal Arts Foundation: Salem State's focus on science and healthcare as firmly grounded in the liberal arts acknowledges the ways in which the university's current strengths and future opportunities are well aligned to the industry strengths and workforce needs of North Shore and Greater Boston regions. Our academic programs in these areas are limited by the condition and flexibility of our physical space. To foster greater student success in these academic domains, the university must continue to extend its regional business partnerships to increase the number of internships and opportunities for student and faculty research.

Place: Salem State is the North Shore's university. Every program, department and public space on campus is regionally engaged through teaching, research, civic engagement, service contracts and cultural events. In pursuit of promoting academic excellence (including the BHE Big Three), Salem State will focus its economic, cultural, social, and workforce engagement in collaboration with regional planning to sharpen impact and wisely leverage local resources.

Civic Responsibility: Salem State seeks to build upon its historic commitment to social justice and civic engagement. The university will continue to be an exemplar for civic leadership statewide, regionally, and nationally with the intention of achieving the Carnegie Community Engagement Classification.ⁱⁱ

PLANNING PROCESS

Salem State University's strategic planning process started in the spring of 2016 with the university's Collaboration Committee accepting the assignment of campus-wide strategic planning as its charge for AY2017. The committee enthusiastically accepted the role to facilitate an inclusive process for collecting the campus community's ideas and recommendations and distilling them into a four-year strategic plan. The committee was led by then Assistant Dean Nate Bryant and Professor Monica Leisey, with Chief of Staff Beth Bower and Executive Director of Strategic Planning and Decision Support Chunju Chen serving *ex-officio*. Linda Campanella, SOS Consulting, was engaged to assist the committee and work started in July 2016 to assure that all aspects of the Salem State community had input. The committee updated to the president, the President's Executive Council (PEC) and the President's Leadership Cabinet. In addition, Board of Trustees Chair Paul Mattera appointed Trustee Kathy Murphy (SSU '75) as liaison to the strategic planning process.

In the fall of 2016 the planning process focused on assessment, reflection, and visioning. The campus community was first invited to reflect on the successes and unaddressed opportunities of the 2013 - 2017 Strategic Plan. Next, internal and external data were examined, including a number of recently administered student surveys, the Salem State Vision Project Dashboard, our Peer & Aspirant Institution comparative data, and our Board of Trustees Scorecard.

The Collaboration Committee then led an intense and inclusive outreach process to ensure key stakeholders would have multiple opportunities to provide input to assure a shared vision and goals. During the fall of 2016, the SSU community participated in well over 2,000 touch points and engagement opportunities. This broad process was used to craft a consensus on strategic strengths and weaknesses. Through this process our mission was confirmed. It also articulated the university's core values, a new vision statement, and a slate of preliminary goals, each of which were presented to the President's Leadership Cabinet, the campus community, and the Board of Trustees in January 2017. In February, task forces were convened and offered further language and strategies for consideration by the Collaboration Committee and the PEC.

The current product reflects this comprehensive input guided by the PEC's effort to prioritize future work and to ensure a comprehensive strategic positioning for the university. The work between the Collaboration Committee and the PEC has "pivoted." Initially, the role of the Committee was to gather, synthesize, and analyze input from the campus community and develop a preliminary set of goals and strategies. The Committee served as a broad-based focus group during the refinement and

prioritization of the plan that ensured that the input of the campus community remained the foundation of and provided direction to the final plan.

OUR MISSION

Salem State's mission is to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society, and serve as a resource to advance the region's cultural, social, and economic development.

OUR VISION

Salem State University will be a premier teaching university that engages students in an inspiring transformational educational experience.

- We put students first in all that we do and are committed to their success.
- We are a community of learners where all faculty, staff, and students have the opportunity to grow as individuals.
- We are innovators, offering a unique brand of public higher education that inspires students to reach higher and achieve more.
- We remain true to our heritage as a liberal arts university while we prepare students for today's workforce.
- We serve the communities of the North Shore while we create an ever more globally aware and culturally diverse campus environment.

OUR CORE VALUES

At Salem State University, two fundamental commitments unite and motivate us in daily pursuit of our mission:

1. **Academic excellence:** We cultivate an intellectually vibrant community led by a faculty dedicated to excellent teaching and enriched by students eager to learn and meet high standards of excellence.
2. **Student success:** We put students first in all that we do and are committed to fostering success in their studies, careers, and life.

We hold the following core values as a public university whose foundation is the liberal arts tradition:

- **Access:** We have a long history of, and deep commitment to, providing a pathway to college participation and completion for first-generation college students and others who may consider this goal beyond reach.

- **Civic engagement:** We forge mutually enriching relationships with, and contribute to, the cultural and economic vitality of our region, the Commonwealth of Massachusetts, and the global community.
- **Inclusion:** We promote an inclusive campus environment that respects human differences, welcomes and celebrates diversity, promotes global awareness, and inspires students, faculty, and staff to be champions of social justice and the common good.
- **Innovation:** We strive to provide a fertile and adaptive environment where entrepreneurial thinking and pioneering approaches flourish.
- **Scholarship:** We support research and creative endeavors that inform or inspire others, expand knowledge and academic disciplines, and connect us with the wider world.
- **Stewardship:** We encourage responsible use and cultivation of resources—human, physical, environmental, and financial.
- **Well-roundedness:** We promote development of a broad range of intellectual, personal, and practical skills and habits of mind by offering educational programs and applied learning opportunities grounded in the liberal arts tradition and geared toward 21st-century careers.

CONTEXT

ENVISIONING SALEM STATE IN FOURth YEARS: BUILDING A SOLID FOUNDATION

Salem State University **today** is a thriving institution and caring campus community distinguished by:

- academic quality and achievement;
- a student-centered approach to teaching and learning;
- deep roots in the liberal arts tradition;
- a strong, enduring commitment to diversity and social justice dating back to the university's connections with early abolitionists;
- a dedicated faculty, staff, and students who strive to do and be their best; and accomplished alumni who are making a difference in their professions, their communities, and the wider world.

We **reaffirm** Salem State's identity as a teaching institution and our belief that undergraduate education is the cornerstone of our mission. Simultaneously, we embrace and continue to lean into the opportunities and responsibilities associated with Salem State's evolution from college to university. Graduate education and faculty scholarship, which we define broadly and inclusively, are central to the enterprise. We balance the need to be responsive to workforce needs with an unwavering commitment to an educational experience firmly grounded in the liberal arts.

Our commitment to academic freedom, equity and access, affordability, inclusivity, civic engagement, social justice, student-centeredness, and sense of community that gives Salem State a small-college feel is unwavering, and we will continue to uphold and leverage these defining distinctions as we move forward. Equally strong is our bedrock commitment to serving students from traditionally under-represented and under-served backgrounds, educating and mentoring them, and improving their social mobility. We steadfastly believe a university education can, and should, change an individual's options, opportunities, and overall life trajectory.

THE FUTURE

Building on our strengths, **four years from now** Salem State will continue to be a thriving, welcoming, inclusive, adaptive university that graduates well-rounded, comprehensively educated, civically minded, socially conscious individuals ready to tackle whatever challenge comes their way; they will be motivated to engage in addressing societal problems that affect the common good and will be well-prepared to succeed and lead in their careers and communities. Resulting in part from enhanced academic advising and a strategic focus on student transitions, engagement, and wellness, Salem State will make robust gains in retention and completion rates and closing the achievement gap between majority and under-represented student populations.

The university will be even more widely recognized and respected for programmatic centers of excellence in science, healthcare and the “helping professions” (human services) as well as for its leadership in the realm of diversity and inclusion. Undergraduate, continuing education, and graduate studies will be well integrated, and academic programs will respond to evolving needs of students and the workplace they will enter, including workplaces that now consider a professional doctorate to be the capstone degree for entry-level positions. Salem State will be leveraging its location in historic Salem, on the North Shore of Massachusetts, and in proximity to the state's capital in ways that distinguish the university's program, enhance the educational experience of students, and contribute significantly to the region by promoting wellbeing and prosperity, safeguarding local resources, and advancing economic growth. The university's role and contributions in the realm of economic development will be more obvious and more important than ever.

Seeking to be all it can be – but not aspiring to be all things to all people – the university will have engaged in thoughtful institutional discernment about how most effectively to invest and deploy limited resources in order to maximize impact. The campus community through shared governance will make tough choices relating to (i) where to pursue intentional growth based on competitive advantage or community need, and (ii) how to leverage opportunities to go deeper in order to enhance impact rather than go wider in order to expand reach. As a result of new and expanded programs that generate enrollment-driven revenue and diversification of revenue sources (e.g., expanded summer conference operations), Salem State will be more financially stable and thus able

to invest more fully in its mission, in its students, and in realizing its potential as a great public university.

Recruitment best practices, clarity of expectations, and focus on cultural sensitivity will have resulted in improved diversity, productivity, and satisfaction among faculty and staff. Employees will increasingly appreciate working in a highly effective and inclusive environment that promotes shared responsibility and instills a leadership culture on campus at all levels. Promoting student success will be seen as everyone's "job," and an understanding and application of growth mindset not only to close achievement gaps, but also to promote employee growth, will be deeply embedded in the university's culture

STRENGTHS ANALYSIS

From 2013 – 2017 the university's priorities focused on student success, aligning with the Massachusetts Board of Higher Education's (BHE) "Big Three": college participation, closing achievement gaps and college completion, all with particular emphasis on students from underserved populations. Historically the *most diverse* institution among the state universities, SSU is focused on the recruitment, retention and graduation of *all* of our students. Salem State attracts most of its degree-seeking undergraduates from the culturally and economically diverse cities and communities located north and west of Boston. The majority of entering first year students are first-generation (over 60 percent in 2015), with significant numbers who are Pell-eligible (40 percent among FTFT students in 2015), and students of color (35 percent of first year students in 2016). Achievement gaps for students of color, first generation and low-income students nationally underscore the critical importance of addressing barriers to enable more students to succeed, especially students from communities that have been historically underrepresented in higher education.

To boost college participation, the university partners with regional and Boston-area high schools and non-profits, as well as works closely with Bunker Hill Community College, North Shore Community College, Northern Essex Community College and Roxbury Community College on facilitating the critical transition between the two-year and four-year institutions. To increase retention and completion, strategic investment in programmatic initiatives have included creation of a First Year Experience program (including a campus-wide common reading initiative and a spectrum of First Year Seminars); establishment of the Center for Academic Excellence, a one-stop center for academic support services (advising, tutoring, supplemental instruction); transformation of the university's general education curriculum, including an overlay that addresses issues of diversity, power dynamics, and social justice; implementation of the early warning retention system "MAPWorks ("Making Achievement Possible"); and consolidation of offices devoted to "the business of being a student" in a centralized (and nationally- recognized) Student Navigation Center. These efforts have borne fruit: in 2007, Salem State's six-year first-time, full-time completion rate was 37 percent. In 2016, the completion rate had risen 15 percentage points to 52 percent.

The university's recent successes are all the more noteworthy in the face of a challenging demographic context. Despite declining high school graduation rates in the northeast, Salem State's enrollment remains relatively level with 1,145 freshmen in 2016 and increased overall applications and admits. Retention rates are stable at 80 percent. Six-year graduation rates increased to 52 percent, while four-year graduation rates grew to over 39 percent. Arts and Sciences scholarships were offered for select programs with the potential to grow. We have made great strides in traditional measures of student success at the undergraduate level. While our headcount of students has remained level, the diversity of our population continues to expand. In the fall of 2016, 34 percent of our entering class self-identified as students of color. We are closing the achievement gaps between our white students and students of color.

In pursuit of these institutional successes, the university has made a number of strategic investments. For example, the Center for Academic Excellence provides academic support services, including advising, tutoring, mentoring, supplemental instruction, reading and test-taking strategies. The office also collaborates with other departments to ensure that students have the appropriate academic supports to be successful. CAE support services were accessed by nearly 8,000 students last year. These services and the respective numbers of students using them include advising (over 5,000), tutoring (nearly 1,500), and mentoring (nearly 500). In addition, programs supporting low-income and underrepresented populations, such as the Summer Bridge Academy and TRIO Support Services, are also under the CAE umbrella.

In 2016 the president, on the recommendation of the President's Advisory Council on Diversity, Affirmative Action, Equity and Social Justice (PAC-D), created the office of Inclusive Excellence, and hired the university's first vice president of Inclusive Excellence. Academic Affairs, Human Resources and Equal opportunity, and the office of Inclusive Excellence have collaborated on putting in place guidelines and strategies for the recruitment of diverse staff and faculty and a bias incident reporting protocol.

Student life's diversity and multicultural affairs office offers mentoring programs with faculty fellows supporting underrepresented students. The Brotherhood is an academic success and retention program offered to support self-identified men of color, while BEES (Bold, Educated, Empowered Sisters) is a similar program to support empowering women of color. *INSIGHT into Diversity* magazine recently awarded Salem State University with the 2017 Higher Education Excellence in Diversity (HEED) Award, a national honor recognizing U.S. colleges and universities that demonstrate an outstanding commitment to diversity and inclusion.

Salem State also has the largest number of international students among the state universities. A comprehensive campus-wide initiative to support international student success transformed the previously isolated, independent pockets of international activity on the campus into a coordinated effort. This multi-faceted, multi-disciplinary approach is infusing internationalization throughout the university's curriculum, campus climate, study abroad programs, visiting scholars, student

engagement, English as a second language programs, immigrant populations, international students, and community engagement.

The university was the only Massachusetts institution awarded a \$300,000 federal grant (2015) annually for three years from the Department of Justice's Office on Violence Against Women. With these funds a campus office was created and staffed by a professional and a graduate assistant to reduce sexual and relationship violence and stalking on campus, enhance victim services, increase prevention and education, and strengthen campus security.

To support the academic, enrollment management, and student life initiatives, administrative departments also undertook key initiatives. Salem State is committed to capital planning that engages the campus and the broader external community. The university completed a 2040 Master Vision plan^{iv} in 2013 that provided a roadmap for capital improvements to support academic excellence and student success. In the past five years, capital projects focused on promoting student success and improving the student experience with the construction of a new library and learning commons, two residence halls, a fitness center, a student navigation center, and a student parking garage. Our expanding School of Social Work was moved to new quarters and the nationally recognized Salem State Theater Department now has a 21st century theater complex.

Over the past three years the university has improved its financial management and operations to meet the needs of this increasingly complex comprehensive university. Organizational restructuring, improved business processes, and transactional systems have been achieved. The creation of a multi-year, data-driven financial planning and execution process are helping to align our resources with strategic imperatives to promote long-term financial stability. The budget is now prepared on an All Funds basis and an updated set of financial benchmarks is in use to assess the institution's financial situation year over year. Work in progress includes development of sophisticated business intelligence analytical tools to assess academic program net margin contribution via integration of data from the disparate student, HR, and financial systems. In FY17 a first-ever, multi-year financial projection (MYFP) was created. As strategic plan initiatives are developed, they are being quantified and layered into the baseline to provide a holistic financial understanding of the future state of the university.

The recruitment of an executive director of strategic planning and decision support in 2015 has significantly improved the university's collection and understanding of data and data management to support analysis of trends and needs. Her collaboration across divisions is focused on using data to inform decision-making in an intentional and consistent manner. Recent examples include new academic program decisions, focused work in the area of academic assessment, and further development of information technology governance and capital project governance processes.

In addition, the university successfully reviewed and received BHE approval for a number of undergraduate and graduate degree programs. The university has again identified areas of academic

strength that respond to statewide and regional needs and opportunities. This was accomplished through a data-driven process that considered BHE data, enrollment trends, market analysis, demographic data, student success information, and programmatic evaluations.

Salem State University always operates with an eye on efficiency and financial prudence, in addition to effectiveness and quality objectives inherent in our operations and activities. We are mindful of the importance of growing revenues other than tuition and fees. Partnerships with external vendors continue to help diversify and increase our revenues. Commissions and other contributions from auxiliary service provider partners generate significant funding for the university. And, a capital campaign led by institutional advancement successfully raised over \$26.5 million, comfortably exceeding the \$25 million goal. Over 12,000 alumni, friends, faculty, students and staff contributed to the 10,000 Reasons campaign. It is of note that the internal campus portion of the campaign brought in \$3.7M with 94 percent support from faculty and staff.

WEAKNESSES ANALYSIS

Although the 2008 Higher Education bond bill had bond capacity to address the delay in upgrading Salem State's scientific laboratory infrastructure funding was only released for the study. This study confirmed the need for a Science Teaching Laboratory Addition to meet student and industry demand for science and healthcare degrees and credentials. Construction of the proposed Science Teaching Laboratory Addition will serve the ever increasing population of regional students seeking biology, chemistry, healthcare and nursing degrees. Our highest demand program is nursing, and Salem State's other health programs are important workforce growth areas that are experiencing increasing student interest. Biology and chemistry are strong and positioned for expansion. However, the university is lacking the laboratory facilities that meet current industry standards and accommodate this growth. Without increases in enrollment (count), the need to cover labor and facility-related expense growth with revenue growth places pressure on prices (rates) that is counter to our imperative to provide reasonable cost offerings to our students in fulfillment of our mission.

As one of the state universities with the highest concentrations of students who are Pell-eligible, student need routinely exceeds available resources. Consequently, the university delivers intensive outreach to students and their families throughout the recruitment process and those on-going retention efforts increase financial literacy. These continuous campaigns were systematized in 2015 to insure that student decision-making is informed and that students have adequate financial resources to achieve their educational goals throughout their academic career. In order to leverage the institutional and individual student benefit from the application of financial aid resources, Salem State initiated an in-depth, multi-year analysis of the impact of aid disbursements in 2017. This study will yield predictive analytics to guide the institution in targeting financial resources to those students with the most need, as well as the greatest likelihood of retention and completion, based on a number of factors.

The business model in higher education is increasingly challenged; Salem State is not immune. Annual increases for the majority of employee salaries and fringe benefits are not controlled by the university. In addition, the decrease in the population of college age students in Massachusetts (and beyond) have led to lower/flat enrollment growth statewide, creating a non-sustainable financial pattern. In addition, the university's investments in its physical plant to support student success and academic excellence have resulted in higher annual debt service, lease, and depreciation expenses. The Commonwealth (DCAMM) and the university recognize that significant deferred maintenance exists.

As noted under strengths, the university has re-organized multiple departments to increase efficiencies, break down traditional silos within the organization, and provide more streamlined, effective programs and services for students. These on-going changes take time, collaboration and negotiation. Uniting multiple offices to focus on clear, common goals, however, provides the leverage needed to foster continuous improvement and constructive change for students. While these transformations have increased collaboration and efficiencies, the opportunity to yield even greater benefits for students grows with more time.

As the demographics of the Commonwealth have changed in the past generation, so too has the makeup of Salem State's student body. While we now educate the most diverse student population among the nine state universities, our faculty/staff demographics have not kept pace. Because this lack of congruence between the student body and the faculty/staff has an impact on the teaching-learning enterprise, we are currently working intentionally and aggressively to bring these demographics into better alignment. Similarly, recent shifts in students' academic interests and workforce needs have created instances in which faculty/staff expertise is not always optimally aligned with areas of high programmatic demand.

On our campus, as in society, the individual student experience can vary greatly due to many factors. The university has initiated Inclusive Excellence training and improving bias reporting procedures to minimize the occurrence of micro and macroaggressions, as well as to respond swiftly and directly when they do happen. Mindful of the strength of our campus diversity and the power of constructive engagement, President Keenan has championed what he calls, "The Salem State Way," as a means to call the campus to engage in difficult discussions, honestly, openly, and respectfully.

While collaboration across campus has increased, the university community is in agreement that much more can be done. The understanding and implementation of a shared vision of Inclusive Excellence has only begun. In the spring of 2016 the president engaged Rankin and Associates Consulting, a nationally recognized firm that provides institutions with an examination of their current campus culture and provides a plan to lay the groundwork for future initiatives, leading to institutional transformation via maximizing equity. The firm worked with a campus climate working group to conduct a study for Salem State. Dr. Rankin presented the results of the study to the

campus in early November and an implementation team will continue to work with the campus community to transform the recommendations into actions.

Collaboration on the strategic planning process was successful, but the campus must embrace the university's goal of a culture of data-driven decision-making. More work is needed in putting the rubrics, data-collection, and analytical tools in place to create a stronger culture of assessment throughout the university. Providing increased employee/faculty training and professional development opportunities will be key to success, as well as strong leadership throughout the organization.

OPPORTUNITIES ANALYSIS

Students build self-esteem and critical social capital by learning and living in a diverse, inclusive community, enabling them to achieve their academic goals and increasing graduation rates. Employers value students with cultural competency skills and the ability to work effectively in teams. As the most diverse of all state universities, Salem State is working diligently to leverage this asset. Seniors and first-year students report that the university places an “emphasis on encouraging contact among students from different backgrounds,” at a rate 12 percent higher than among peer institutions (NSSE 2016.)

Preparing graduates to transition to their roles as productive citizens, contributing to the economy, is a critical goal for the institution, as well as for students, families, and the Commonwealth. The university recognizes the high-impact benefits of internships and experiential learning in preparing students for the work place. However, the proliferation of internship opportunities across campus with widely varying expectations, policies, and practices, has made it challenging to make such experiences consistently accessible, sustainable, and assessable. While internships create rich learning opportunities for students, the expansion of such opportunities has been challenging to manage systematically. As a result, the university must establish greater clarity in expectations for internships as we move toward establishing signature internship programs and better mechanisms to prepare and supervise students in such environments.

Through increasing the university's ability to oversee internship programs more systematically, the resources devoted to promoting and developing internships could yield greater benefits for students and the community, as the institution becomes a more consistently reliable partner in the process. Thus, opportunities abound for greater collaboration within the university and with the external community, including alumni, businesses, and non-profits, to create and promote internships and to offer a more streamlined and seamless experience for students, faculty, and community supervisors.

Graduate enrollment is strong and growth opportunities exist, particularly as professions impose new educational requirements on practitioners (masters in social work, masters in accountancy, masters of science in athletic training, and a clinical doctorate in occupational therapy all build on

existing, strong programs). Another opportunity the university is pursuing to meet the Commonwealth's goals to increase the educational level of the workforce is degree completion programs.

Future demographic and enrollment trends offer the opportunity for Salem State to explore the benefits and possibility of Hispanic Serving Institution (HSI) designation. The university is well-positioned to capitalize on this opportunity to serve the North Shore, through its focus on Inclusive Excellence. Programmatic initiatives in this area include, supporting student diversity, engaging the campus in developing cultural competencies, diversifying university faculty and staff, and eliminating barriers to success identified through the Campus Climate Study.

Increasing partnerships/couplings/articulations with PK-12 districts, community colleges, University of Massachusetts Lowell, and independent institutions in the region demonstrates the university's and public education's significance as a driving force for prosperity on the North Shore. Salem State works closely with the Salem Public Schools throughout the school year and hosts an elementary school on campus. The university also works with other cities including Lynn and Revere to provide both teacher education and programmatic support. And Salem State has a 20-year Upward Bound partnership with the city of Lawrence, including hosting summer residential programs on campus.

Moreover, the growing strength of partnerships with community colleges through collaborative programs such as the Commonwealth Compact, CommUniverCity, and the Early College PIF Grant, highlight Salem State as a destination for students regionally. In addition, administrative efforts to increase transfer pathways through MAST, Mass Transfer, and dual admissions agreements with regional community colleges (Bunker Hill Community College, North Shore Community College and Northern Essex Community College), which go beyond deferred admissions, serve to streamline opportunities for students and increase shared institutional enrollments.

Salem State University continues to strengthen its alignment and collaboration with the business, cultural, economic, and workforce strengths and needs of the North Shore region. Historically Salem State has partnered with businesses and non-profits to respond to workforce needs; to provide academic research for regional issues relative to economic development, sustainability and historic and cultural resources. Recently, Salem State has become involved in local and regional issues such as Youth at Risk, civic responsibility, veterans' support, LGBTQ rights, and addiction recovery. Additional partnerships and leadership include Salem State's central role in the founding and development of the North Shore Alliance for Economic Development and the university's Enterprise Center which houses and supports start-up and small businesses.

The university maintains signature partnerships with a wide variety of employers. Among these signature partnerships, are relationships with businesses in the area of accounting, the life sciences,

information technology, finance, and management. A specific example of Salem State leveraging its academic expertise to the benefit of regional and statewide economic development is the Cat Cove Marine Laboratory in Salem, which serves not only the North Shore, but many coastal communities throughout Massachusetts. In partnership with the Commonwealth, the laboratory produces seed clams which are distributed to cities and towns with dormant clam flats. Faculty and students participate in applied research and contribute to the sustainability of the coastal ecosystem. Cat Cove has partnered with Legal Sea Foods to establish a blue mussel long line aquaculture farm; the first offshore shellfish farm in federal waters on the Atlantic Coast and only the second in the U.S.

The university must expand the university's alternative modes of program delivery, including an increased focus on the credentialing needs of students. On-line offerings and alternative scheduling meet the needs of students who are returning to college later in life (post-traditional high school years), as well as students starting college while still in high school (early college efforts.) Salem State, similar to many sister institutions, serves not only first-time, full-time freshman students, but welcomes a significant number of transfer students from private colleges, public universities and community colleges.

Regionally, Salem State is a member of the Northeast Consortium of Colleges and Universities (NECCUM) through which students at member institutions (public and private) have the opportunity to take courses at and use the libraries of any of the NECCUM member institutions. The consortium is a venue for consultation with our region regarding programming opportunities. In addition, SSU is a partner in the Life Sciences Consortium of the North Shore, joining three other regional higher education institutions and North Shore Innoventures (a cleantech & biotech start-up incubator) to work collaboratively on advancing the tech community via workforce development, shared research space and instrumentation and research.

The university must continue to identify, cultivate and activate resources external to the campus community. First and foremost are our alumni, who live and/or work within our region. The recent capital campaign, the efforts of the Alumni Association, academic departmental engagement with their alumni, and the connections made with various student support offices such as the office of career services and athletics has increased stewardship opportunities. Collaboration towards shared external relational objectives will be one of the keys to overall success. Our alumni are also important to meeting our inclusion goals especially in recruiting faculty and staff and connecting with our students.

THREATS ANALYSIS

The Commonwealth has a number of important priorities vying for its limited resources. Available capital funding has proven inadequate to keep up with deferred maintenance or provide spaces of sufficient quality (suitability) and quantity to meet 21st century instructional needs. For Salem State, this is most urgently reflected in our lab sciences spaces, a critical challenge given the regional

workforce needs in the sciences and health-related fields. Securing funding for the Science Teaching Laboratory Addition is a high priority. Some of the university's physical academic infrastructure is obviously insufficient, which limits enrollment, faculty research and business partnership opportunities. Salem State has responded to the need for alternate delivery modes, such as on-line and hybrid. The university will be using the enrollment management, academic programming and marketing studies to identify additional opportunities for course delivery and the required academic technology infrastructure and faculty course design support needs.

The demographic decline in the Commonwealth's high school population will continue a downward trend in the foreseeable future. This has made the recruitment landscape increasingly challenging, though at present Salem State has been able to maintain a reasonably competitive position in an industry generally showing negative growth in New England. The strategies described above and below are key to serving future students successfully meeting the workforce needs of the Commonwealth and addressing the goals of the BHE's Big Three priorities.

STRATEGIC POSITIONING

BHE "BIG THREE" – Boosting College Completion; Closing Achievement Gaps; and Attracting and Graduating More Students from Underserved Populations

The proposed goals of Salem State's strategic plan include an emphasis on student success and academic excellence. In AY2007 Salem State had a first-time, full-time graduation rate of 37 percent; at the completion of AY2016 the rate rose to 52 percent. This achievement reflects the university's commitment to all students achieving their goal of earning a baccalaureate education. During this same period of time, achievement gaps closed with our African-American students achieving a 53 percent graduation rate and Latino students, a 42 percent graduation rate. Therefore, the university is confident the strategies in place to promote success are having a positive impact. The percentage of students of color in our student body has grown from 20 percent in AY2008 to 30 percent in AY2016; moreover, our entering class in fall of 2016 was 34 percent students of color, suggesting that the level of diversity will continue to rise. We are committed to continuing these trajectories of student access and success across all of our student populations including dual-enrollment, early college, transfer, and graduate students.

MAKING EXCELLENCE INCLUSIVE

Inclusive Excellence is Salem State's guiding principle for access, student success, and high-quality learning. This framework, adopted from the Association of American Colleges & Universities, helps Salem State integrate diversity, equity, and educational quality efforts into our mission and institutional operations. Making excellence inclusive is thus an active process for Salem State which responds to its historic mission of welcoming under-served diverse populations such as veterans, first-generation, ethnically and culturally diverse, LGBTQ, or individuals with disabilities. We will achieve excellence in learning, teaching, student development, institutional functioning, and

engagement in local and global communities. Inclusiveness and excellence are inter-dependent, as opposed to the traditional perspective that separates the two concepts. To practice inclusiveness is excellence; both are core values of the university.

SCIENCE & HEALTHCARE ON A LIBERAL ARTS FOUNDATION

Salem State has enjoyed a strong reputation for training students in science and healthcare disciplines, and has seen a decade of growth in these academic areas, despite limited facilities and a competitive marketplace. Nursing and biology are majors that are capped due to lack of adequate laboratory space. Nursing students are unable to take full advantage of simulation-based instruction because current facilities are limited in number. Clinical placements in many of the majors that requires them (nursing, occupational therapy) are increasingly difficult to secure, with looming threats by some healthcare partners to begin charging the university for each student placed. In partial response to these limitations, Salem State has added a healthcare studies program specifically designed for students interested in the healthcare and human service industry but who prefer to work in a non-licensed, non-clinical setting, further demonstrating the university's commitment to aligning its programs with one of Essex County's regional strengths and workforce needs. Critical to meeting these regional needs is the construction of the Science Teaching Laboratory Addition to Meier Hall and creation of additional simulation laboratories.

PLACE

Salem and the North Shore region of Massachusetts is a special place where the cultural, natural, and historical are intertwined with an entrepreneurial small business tradition. From the winding ocean fronts and rivers to the bustling seaports and mill towns, Essex County is distinctive. Salem State University's areas of academic excellence and civic connection promote the well-being and prosperity of the region and the Commonwealth. Founded as a Normal School to educate teachers in 1854, the university continues to lead in addressing the county's economic, educational, cultural, environmental, and workforce needs. Fostering the health and well-being of the region through education, healthcare, economic development, and social justice responds to the county's aging demographics and increasingly diverse population. Science and healthcare innovation, entrepreneurship, and workforce leadership advances economic growth. The university's academic expertise and research in the areas of coastal environment, cultural heritage, tourism, and arts and leisure safeguard local and regional resources. And, the Enterprise Center and the Small Business Development Center (SBDC) provide the community with timely and relevant support for small and large businesses.

CIVIC RESPONSIBILITY

Salem State has a historic commitment to civic engagement and civic learning, which has gained significant momentum with the investment of professional leadership in the Center for Civic

Engagement in 2015. The university strives to be an exemplar for civic engagement and civic learning leadership statewide, regionally, and nationally. Already having achieved the national President’s Honor Roll for Civic Engagement, our center partners internally with faculty and staff and externally with regional partners to provide our students with the pedagogy and experiential learning opportunities to become engaged members of their communities, the nation, and the world.

VISION-SUPPORTING OVERARCHING GOALS AND KEY STRATEGIES

The strategic positions and the university’s goals as reflected visually in Figure A. Financial Vitality and Sustainability, and Collaboration, Inclusion & Stewardship are foundational to achieving Academic Excellence and Student Success. The university has used the January 2016 NEASC Fifth-Year Interim Report^v as a guide and has aligned the duration of the plan to our decennial NEASC report in 2021.



GOAL: Financial Vitality and Sustainability - Strengthen Salem State’s financial foundation, align resources with priorities, and foster innovation to drive new revenue streams. Identify and implement additional opportunities to contain, reduce, or avoid future growth in costs.

Financial Vitality and Sustainability Strategies:

- Develop and implement a strategic enrollment plan based on information from three major initiatives undertaken in 2017: a marketability analysis, a financial leveraging study, and internal business intelligence work^{vi} that leverages program strengths, capitalizes on identified growth markets, and increases net tuition revenues. Specific programs that the

university will target for implementation are a B.S. in criminal justice administration, a B.S. in exercise science, a B.S. in healthcare studies, a B.S. in information technology, and the university will also pursue additional graduate degrees in nursing administration (M.S.), social work (D.S.W.) and occupational therapy (D.O.T.). In the context of the strategic enrollment plan, the university will expand alternative modes of course delivery in academic areas for which such innovations (e.g., online, hybrid, cohort-based, low-residency) are programmatically sound and fiscally prudent.

- Increase and diversify sources of non-tuition revenue to support ongoing operations and enable investment in strategic priorities, including expanded financial aid for students. Specifically, the university will increase summer conference revenue for the campus' residence halls and meeting spaces; evaluate further public-private opportunities such as leveraging the unique facilities to generate revenue streams via the university's Cat Cove Marine Center (such as the long-line blue mussel farm partnership with Legal Sea Foods) and the Enterprise Center's professional education programming. Increase applications and awards for external public and private grants.
- Increase the Salem State University Foundation's endowment by broadening our campus-wide culture of philanthropy and deepening engagement with Salem State alumni and the wider community.
- Perform ongoing and systematic analyses of academic programs to assess the relationship between required resources and (i) student demand/enrollment trends, (ii) workforce needs, and (iii) contribution to institutional mission; reallocate resources as appropriate to optimize student access to high-demand programs and sustain academic excellence.

GOAL: Collaboration, Inclusion, and Stewardship - Foster a university-wide culture of inclusion, accountability, collaboration, and stewardship.

Collaboration, Inclusion, and Stewardship Strategies

- Establish Salem State as an institution embodying Inclusive Excellence that provides a culture of inclusion and belonging that fortifies SSU's reputation as a welcoming and diverse university committed to inclusion and equity.
- Intensify the culture of assessment and promote data-driven decision making in all aspects of the university's operations.
- Celebrate and showcase the accomplishments of faculty, staff, students, alumni, and the university itself; equip and engage members of the SSU community to be effective advocates and ambassadors in the wider community; and generate a stronger sense of pride and connection to place for all members of the campus community.
- Advance a leadership culture on campus that promotes shared responsibility and accountability for upholding Salem State's core values and behavioral norms.

GOAL: Academic Excellence - Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society.

Academic Excellence Strategies:

- Building on Salem State’s strength as a thought leader in the traditional arts and sciences (including the humanities, science and healthcare disciplines, the visual performing arts), health and human services (e.g., education, social work, nursing, occupational therapy, criminal justice), and business education, expand program enrollments that align with workforce needs through new program development, alternative mode of offerings including on-line, alternative scheduling options, and credentialing.
- Strategically align graduate programs with Salem State’s programmatic strengths, regional trends, and evolving entry-level degree requirements in the health and human services sectors to expand the enrollments to meet the regional workforce needs. This will be achieved, in part, by raising the visibility of these offerings.
- Leverage and seek to expand the contributions Salem State makes as a catalyst for economic growth and bring the university’s intellectual capital to bear on local issues to expand opportunities for students to have internships and other experiential opportunities that lead to increased post-graduation work placements.
- Provide up-to-date and environmentally friendly facilities and infrastructure, including information technology that meets evolving needs, advances teaching and learning, and attracts high-quality faculty, staff, and students to Salem State. Implement the next phase of the university’s Master Vision^{vii} including design and construction of the Science Teaching Laboratory Addition and for the next stage of the North Campus Precinct Study.
- Expand public awareness of Salem State’s academic strengths and institutional distinctions, and draw particular attention to the achievements and contributions of the university’s faculty, staff, students, and graduates. Champion SSU’s distinctive programs, academic pillars of excellence, and unique location as compelling differentiators in a competitive higher education landscape.
- Expand opportunities for civic learning and civic engagement through the implementation of active learning pedagogies

GOAL: Student Success - Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal, and career goals.

Student Success Strategies

- Increase high school student participation in college through early college, dual enrollment, and pipeline programs (e.g., Upward Bound) targeted at communities with lower college attendance rates.
- Reinvent academic advising to provide comprehensive support for students including multi-year scheduling, curriculum/career maps, refined course offerings, and professional advisors to guide the first two years of study.
- Ensure student success by expanding high-impact programs (student research, study-abroad, internships, cohorts etc.) that prepare students for their future careers.
- Provide a student-centric culture of inclusion and belonging, fortifying SSU’s reputation as a welcoming and diverse university.
- Ensure students acquire necessary knowledge, skills, experiences, and sensitivity to be informed and engaged citizens who value diversity and champion social justice, civic responsibility, and Inclusive Excellence to promote a spirit of service and heightened sense of mutual responsibility among members of the campus community.
- Increase public awareness of the intrinsic value to students and the economy of coupling liberal arts majors with professional preparation programs.

BUSINESS PLANS

The Salem State University comprehensive strategic plan is supported by nine integrated component business plans. Each of these components impact the priorities and resourcing of the strategic plan. As cross-divisional planning groups review data and projections, the feasibility and availability of resources to support multiple priorities will be evaluated, and opportunities for consolidation and collaboration identified. This will strengthen the implementation of the strategic plan by assuring that the strategies are integrated, focused, and supportable.

Academic Affairs:

Salem State University will be widely known as the state university that confers affordable, high-quality degree for all students, with a focus on educating members of historically underrepresented communities. The university will also become a “first choice” institution of higher education for residents of the North Shore, widely known for an effective approach to fostering academic success for students of diverse backgrounds at various stages of their personal and professional careers. While maintaining its long-standing commitment to a strong educational core in the liberal arts, over the next four years, Salem State will emphasize growth in those disciplines that meet the current and projected needs of the region, including those requiring preparation in the sciences and healthcare. Undergirding the academic experience of every Salem State student will be commitments to the value of diversity, inclusion, and collaboration to foster a socially just and civically engaged society.

Capital Planning:

The success of the university and its strategic plan depends on providing the physical resources necessary for our students to succeed. Capital Planning (CP) supports the plan by working with all

areas of the institution to maintain, improve, and construct the physical resources that will advance the goals of the university. It will be guided by the Salem State University Master Vision 2040 (2013) and the North Campus Precinct Study (2017).

Community Outreach: The success of the university and its strategic plan depends on communication and collaboration both internally and externally. External Affairs (EA) and Public Relations (PR) support the plan by working with all areas of the institution and its external partners to promote the strategic concepts while making connections that will advance the goals of the university. This involves strong communication and transparency both within and outside the university. A key factor to the community outreach work that will benefit all five priorities of the strategic plan is enhancing the reputation of the university. This effort will increase our opportunities with external partners while also providing a sense of pride, place, and inclusivity within the institution. This work should focus around the key areas of the strategic plan and allow for all members of the internal community to be aware of, and have a voice in, campus priorities and happenings.

Enrollment Management/Marketing:

Salem State’s strategic enrollment plan will rely on information from three major initiatives. The marketability analysis (performed by industry leader, Stamats) will determine which of our current (or possibly new) programs have room to grow from an external market perspective. This work is largely complete and has identified a handful of undergraduate and graduate programs that have significant growth opportunity. A financial aid leveraging study (performed by industry leader Ruffalo Noel Levitz) will assist with decisions on how to best use our institutional aid to drive key institutional priorities, like enrollment growth and increased net tuition revenue. And, the university’s internal business intelligence work to help us identify “profit margin.” These three key initiatives will help to shape our enrollment strategy for the future, and allow us to move forward in a data-informed way.

Finance and Business:

The Finance and Business plan will continue to expand capabilities to improve the financial management of the university. This includes providing data and systems to support decision making and performing analyses to support strategic choices about investment or disinvestment in academic programs, capital assets and administrative activities. This business plan will generate additional revenue from underutilized assets.

Human Resources/Inclusive Excellence:

The Human Resources (HR) will advance the University’s strategic plan by providing superior service, support and opportunities critical to fostering a talented, diverse and engaged workforce. In partnering with Inclusive Excellence, HR views itself as an organizational leader in delivering employee excellence; recommending, supporting, and implementing personnel policies and procedures; providing employee development opportunities; and in partnering with key University

constituents and stakeholders to attract and retain an exceptional, diverse workforce. In collaboration with ITS and Finance and Business, HR strives to help senior management produce data driven decisions by seeking appropriate systems and infrastructure to support the employee environment as it relates to student success.

Information Technology:

Information Technology Services' (ITS) focus will be in three strategic areas. First, developing a campus-wide strategy and implementation of business intelligence to support data driven decision making by departments and senior leadership. Second, ITS will continue to support the creation of new programs by working with the deans and enrollment management to ensure systems and infrastructure are able to support such programs. And, third, ITS has embraced an Inclusive Excellence culture in three different areas; the classroom, the public facing website, and the academic computing environment, and will continue to expand these capabilities.

Institutional advancement:

Institutional Advancement (IA) seeks to foster inclusive relationship-building with our alumni, students, and friends, and involve our campus and community partners in the diverse community life of our university. IA will promote investment in the strategic priorities of Salem State University, such as the science teaching laboratories and scholarships to assist in eliminating financial barriers for students. We will connect donor passion with strategic plan priorities as well as engage alumni with our campus as resources for speakers, volunteers, mentors, and employer relation opportunities.

Student life:

Student life has recently reorganized to address the needs of Salem State students. The reorganization includes a cluster model, which brings together the eight student life departments to address three major themes: wellness, engagement and student experience/transition. To deepen the effectiveness of this model, our work will be approached with an emphasis on reducing redundancies and maximizing resources (human and financial capital); focusing on reaching depth of high impact practices for our students and systematizing practices so all students have the opportunity for personal development and learning. Specifically, student life will focus on increased student development and preparedness for a life of learning and personal success; greater retention and persistence of all students, with a focus on the “murky middle” and traditionally marginalized students; and higher student satisfaction in areas of living and learning.

METRICS

The following table presents the university-wide metrics for Salem State University’s strategic plan. The executive director of strategic planning and decision support is tasked with leading and supporting the campus with development of specific metrics for each strategy. The Collaboration Committee will provide oversight of reporting.

Key Metrics	Baseline FY2017	Goal FY2021
Financial Vitality & Sustainability:		
Total Enrollment (Fall 2016)	9,001	TBD
Endowment	\$28.5M	TBD
Operating Cash Flow Margin	2.16%	TBD
Gift Revenue to University	\$1,800,982	TBD
College Completion		
Six-year Graduation Rate All Students*	52%	62%^
Closing Achievement Gaps		
Six-year Graduation Rate Black - White*	-1.48	0.00^
Six-year Graduation Rate Hispanic - White*	-8.68	0.000^
Six- year Graduation Rate Male-Female*	-5.62	0.000^
Six-year Graduation Rate Pell-Eligible vs. Non-Pell-Eligible	-10.85	TBD
% Faculty of Color	19%	TBD
% Staff of Color	18%	TBD
Achieve Hispanic Serving Institution Status		TBD
Civic Engagement		
Achieve Carnegie Classification for Civic Engagement		2020
Workforce Development		
Open Science Teaching Lab Addition	Study Completed	TBD

*BHE Big 3

^Existing Commitments to BHE

ⁱ “Campus Climate” (also called the “college environment”) is defined as “the current attitudes, behaviors, standards, and practices of employees and students of an institution.” Positive personal experiences with the college environment and positive perceptions of the college environment generally equate to successful outcomes. These successful outcomes include: positive educational experiences and healthy identity development for students,

productivity and sense of value for faculty and staff, and overall well-being for all. The college environment is shaped through personal experiences, general perceptions and institutional efforts. The campus climate study is multi-stage process that allows us to measure people’s personal experiences and perceptions so that we can more thoughtfully address challenges and plan strategic initiatives to enhance the college environment. An external consultant, Rankin & Associates, was hired to work with our community to develop a survey to administer to the entire Salem State community, to analyze and present the results of that survey and to establish a community implementation team to oversee the use of the data and ensure that concrete actions follow from the results of the survey.

ii http://nerche.org/index.php?option=com_content&view=article&id=341&Itemid=618

iii Salem State University has aligned its strategic plan with its decennial New England Association of Schools & Colleges (NEASC) accreditation report in 2021. https://records.salemstate.edu/sites/records/files/reports/2017-04/NEASC_Report_for_Salem_State_University_01.19.2016.pdf

iv <https://www.salemstate.edu/offices-and-services/facilities/capital-planning-and-facilities-management>

v https://records.salemstate.edu/sites/records/files/reports/201704/NEASC_Report_for_Salem_State_University_01.19.2016.pdf

vi Salem State’s strategic enrollment plan will rely on information from three major initiatives:

1. Marketability Analysis (performed by industry leader, Stamats) – to help us determine which of our current (or possibly new) programs have room to grow from an external market perspective. This work is largely complete and has identified a handful of undergraduate and graduate programs that have significant growth opportunity
2. Financial Aid Leveraging study (performed by industry leader, Ruffalo Noel Levitz) – to help us determine how to best use our institutional aid to drive key institutional priorities, like enrollment growth and increased net tuition revenue. This work will be complete by the end of December.
3. Internal business intelligence work – to help us determine program “profit margin”

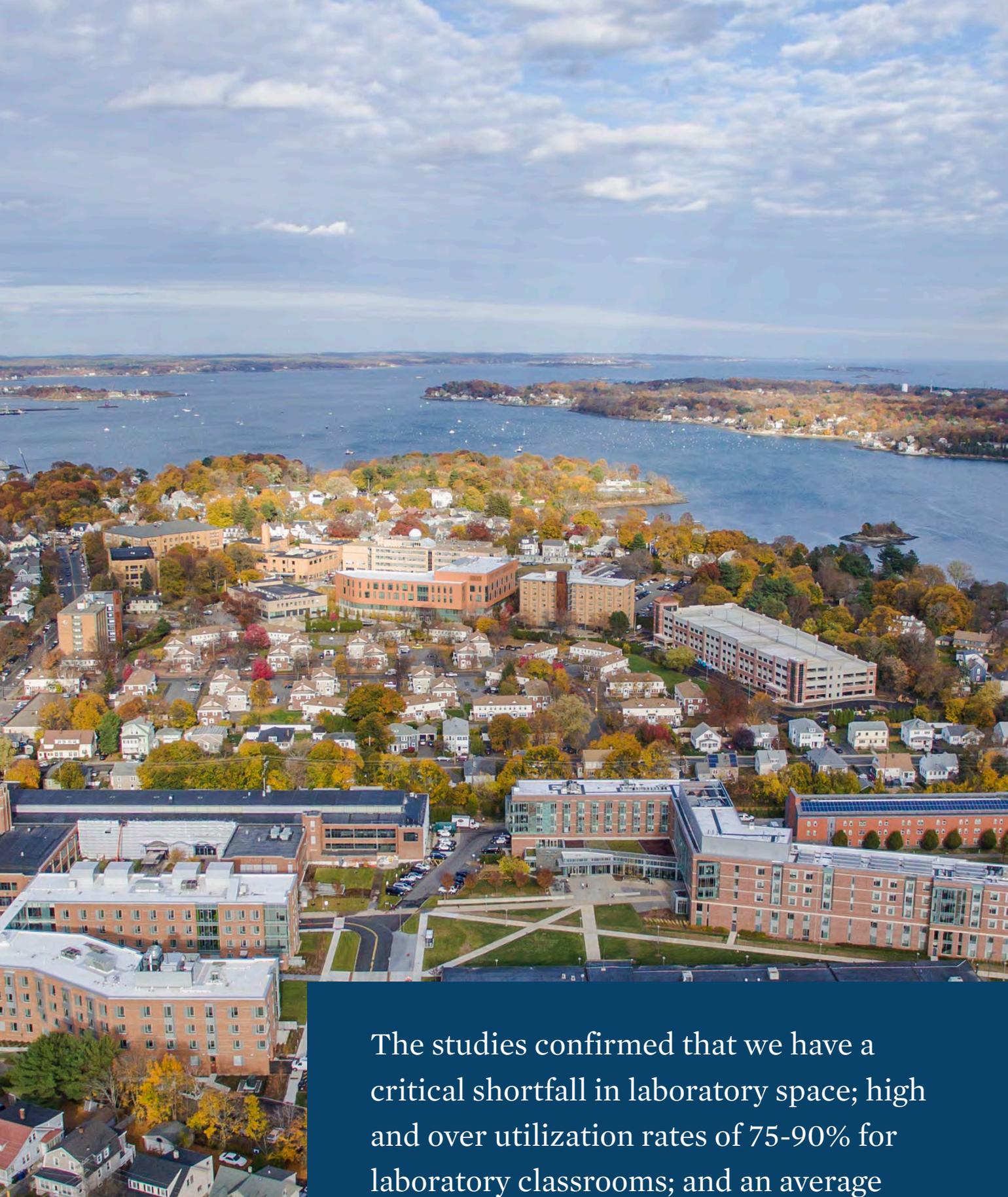
These three key initiatives will help to shape our enrollment strategy for the future, and allow us to move forward in a data-informed way.

vii See Note iii above.

Science Teaching Laboratory Addition

Salem State University

December 2017



The studies confirmed that we have a critical shortfall in laboratory space; high and over utilization rates of 75-90% for laboratory classrooms; and an average enrollment in lab courses of 100%, which results in filling every lab offered.



Science Teaching Laboratory Addition

Why this project?

DCAMM studies in 2007 and 2013 established that Salem State University's current science laboratories, located in Meier Hall, are insufficient and unsuitable for renovation to 21st century laboratory standards.

The studies confirmed that Salem State University (SSU) has a critical shortfall in laboratory space; high and over utilization rates of 75-90% for laboratory classrooms; and an average enrollment in lab courses of 100%, which results in filling every lab offered. SSU leads the state university system in biological and biomedical sciences; physical sciences; and health professions and related programs, enrolling 26.5% of all courses in these areas. Although SSU is a system leader in the education and development of scientists, nurses, occupational therapists and health science professionals on the North Shore and throughout Massachusetts, insufficient and outdated laboratory space limits our ability to meet workforce needs regionally and throughout the Commonwealth. In response to these findings, SSU requests funding for a science teaching laboratory addition (STLA) to Meier Hall (MH).

Our labs are used for a broad range of coursework for science majors, as well as, support courses for health disciplines and general education requirements. SSU's strategic plan, which was recently approved by the Board of Higher Education, recognizes the importance of enrollment growth in these areas to the



Commonwealth's workforce and confirmed that STLA will meet student and industry demand for science and healthcare degrees and credentials. Our current laboratory capacity is inadequate to meet both these demands and our pedagogy. STLA will provide much needed and modernized space for biology, chemistry and geology majors; will allow for greater flexibility in course scheduling, student and faculty research, and alternative delivery methods; and will free up space in MH to better serve general education and support courses.

STLA is a top priority of the university's 2013 Campus Master Vision plan. High-quality laboratory space was identified as key driver for programmatic growth, which is limited by our existing facilities. Current structural conditions prohibit the modernization of existing labs and the installation of state-of-the-art equipment to train our students. STLA's 20 teaching and research labs would not only allow for the upgrades necessary to educate our students in 21st century laboratories and to address lab safety upgrades, but would also enable the repurposing of existing laboratories in MH into dry labs, classrooms and offices, supporting the ultimate goal consolidating our academic functions on South Campus to North and Central Campuses.

STLA will support the growing and high demand workforce needs in biotechnology, bioscience, pharmaceutical, nursing and allied health industries that are strengths of the North Shore.

SSU academic programming is well aligned with the workforce needs of the region and is a major provider of science and healthcare BS/BA+ degrees for the North Shore and beyond. A recent study by the North Shore Workforce Investment Board has documented the increasing need for these employees as the incumbent regional workforce reaches and passes retirement age. STLA will support the growing and high-demand workforce needs in biotechnology, bioscience, pharmaceutical, nursing and allied health industries that are strengths of the North Shore.

STLA also aligns with the Commonwealth's priorities by replacing unsuitable facilities with modern scientific teaching spaces, which will allow for the expansion of scientific and healthcare disciplines. The project supports Massachusetts' goals of ensuring it remains a global leader in life sciences by investing in human

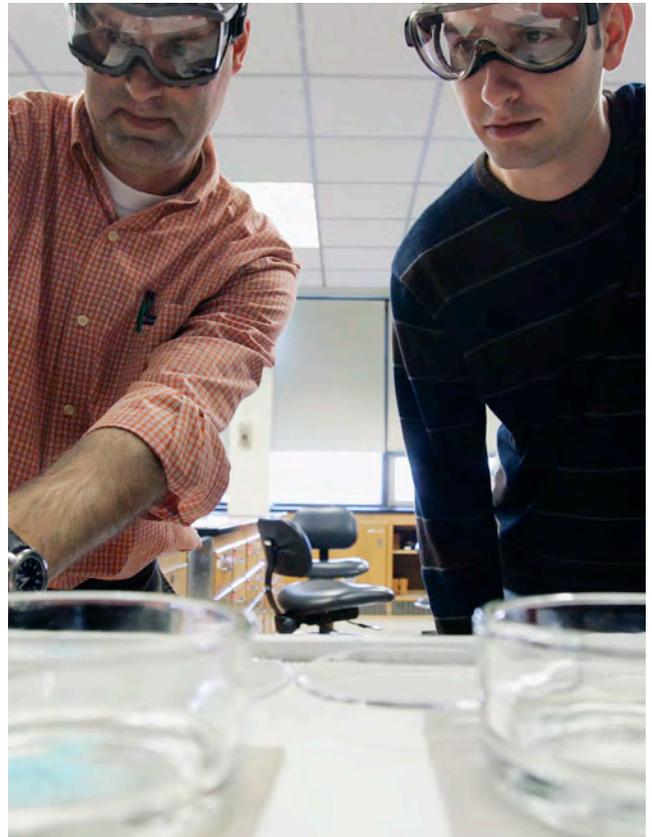
As the only state university without 21st century laboratories, SSU will become significantly challenged to meet its mission for both our students and the region we serve without STLA.



capital and workforce development, and preparing our graduates for careers in these fields in up-to-date facilities. Construction of a laboratory-only addition will bring our infrastructure in line with the functionality and instrumentation of the region's STEM and healthcare industries and will expand our ability to deepen programmatic collaborations with regional education, non-profit and industry partners. Regional partners provide some exposure to modern infrastructure via internships and part-time employment, but this is not enough to fully prepare our graduates for their future occupations.



Additionally, STLA supports the DHE Big 3 goals of college participation, college completion and closing achievement gaps. Although SSU graduation rates have increased, retention has improved, and SSU has been a system leader in closing achievement gaps over the past 10 years, our laboratory limitations restrict growth in some STEM areas. For example, SSU has capped admissions to biology and nursing programs due to the lack of adequate laboratory space. As the most diverse of the state universities, our changing demographic compounds the need to improve our lab spaces so that we can continue to close the achievement gap in these important fields.



Despite outdated and unsuitable laboratory infrastructure, our talented faculty educate majors in the STEM and health sciences fields as well as all students with complementary coursework valued by industry in business, liberal arts and education. Our alumni are valuable assets to the North Shore region and beyond. With the demographic shifts and the growing occupational opportunities of the North Shore, we need to make sure our graduates are prepared with the most up-to-date facilities available. As the only state university without 21st century laboratories, SSU will become significantly challenged to meet its mission for both our students and the region we serve without STLA.

Campus Master Plan

STLA Alignment with Campus Master vision

Completed in July 2013, the Salem State University (SSU) Campus Master Vision establishes a plan for the institution's presence in the greater North Shore region—a plan rooted in the academic mission of the university and one that advances its role in community and economic development. The Campus Master Vision builds on and extends the ideas originally communicated in the 2007 Campus Master Plan. The Science Teaching Laboratory Addition (STLA) has been a consistently documented need in each of the planning studies, and was the subject of a follow-up, more detailed feasibility study completed in 2014.

Four key principles govern the 2013 plan: flexibility, connectivity, identity, and community. These principles reflect the university's aspirations to establish a compact and efficient campus core that maximizes programmatic synergies and consolidates Salem State's footprint within its Central and North Campuses. In so doing, SSU divests of much of its South Campus facilities and, accordingly, reduces overall deferred maintenance liability.

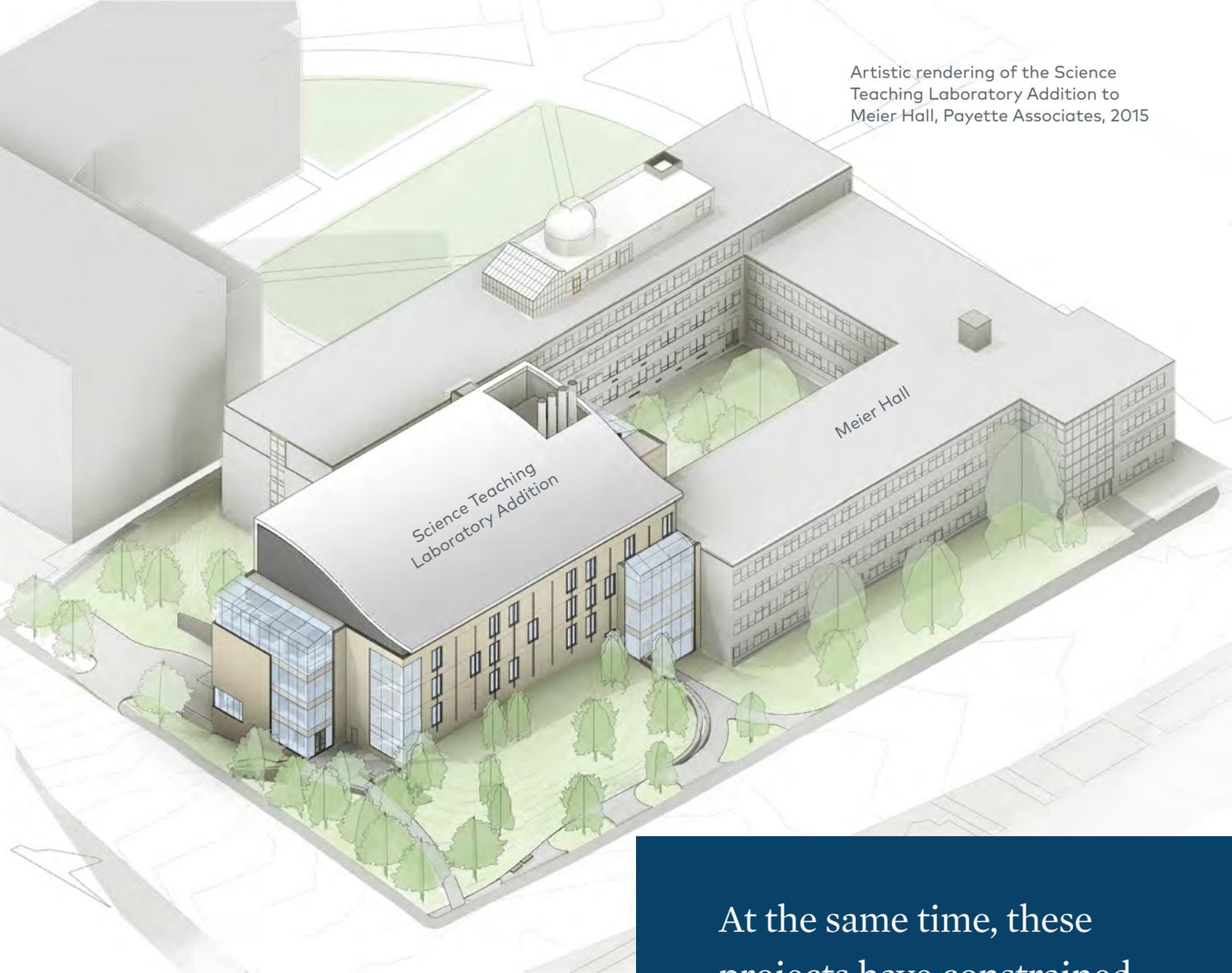
Since completion of the 2007 and 2013 planning efforts, SSU has successfully completed numerous projects to improve both the academic and student experience while addressing deferred maintenance issues within ageing buildings and infrastructure. Some of these projects were completed in partnership with DCAMM, including full state funding for the Frederick E. Berry Library and Learning Commons and partial state funding (roughly 27.5%) for Sophia Gordon Center for the Creative and Performing Arts Center renovation. Other projects were completed in collaboration with MSCBA, which issued bonds that are repaid by student fees, including the Harold E. and Marilyn J. Gassett Fitness Center, Viking and Marsh Residence Halls, and the North Campus Parking Garage.

These principles reflect the university's aspirations to establish a compact and efficient campus core that maximizes programmatic synergies and consolidates Salem State's footprint within its Central and North Campuses.

Salem State University has also funded various leases and fit-outs to accommodate administrative needs (preserving core campus buildings for academic functions) with operating funds. All of these projects demonstrate a strong commitment to implementing the Campus Master Vision, and exhibit the university's willingness to contribute our own funds toward making the Vision a reality. At the same time, these projects have constrained our capacity to fund and implement a critical project of the size and scale of STLA.

STLA remains the highest priority project for the university, and closely aligns with our academic plan and the needs of the Commonwealth's workforce. The current science facilities in Meier Hall (MH) limit our ability to meet the demand of STEM courses both for science majors and for health disciplines as well as general education requirements. The 2013 Master Vision plan documents the hyper-utilization of MH labs, both from a seat fill rate (often 100%) and room use rate (75-90%), well in excess of Massachusetts' space standards.

The STLA project is not only a high priority in terms of academic need, but is also the highest priority deferred maintenance project for SSU. Various studies have concluded that Meier Hall is not suitable for wet laboratory uses due to low ceiling heights and mechanical system limitations—the key factors that led to the conception of STLA. Meier Hall, however, does offer important programmatic space (dry lab, classroom, and office) to allow the university to



subsequently address deferred maintenance issues in many other of its buildings, including Sullivan Hall, the Horace Mann Building, Ellison Campus Center, the Dining Commons, and divestment of 92,000 gross square feet of South Campus facilities, much of which are in poor condition.

In this way, STLA becomes the critical domino for reducing the university's deferred maintenance liability while also realizing its academic mission. Similar to the Frederick E. Berry Library and Learning Commons Project, capital investment by the Commonwealth in the Science Teaching Laboratory Addition, will position SSU to address other deferred maintenance projects in smaller increments.

At the same time, these projects have constrained our capacity to fund and implement a critical project of the size and scale of STLA.



The divestment of South Campus represents a significant opportunity for SSU and the Commonwealth. Many buildings on South Campus are in poor physical condition with a total of \$42.5M in deferred maintenance. The isolation of this area also complicates class scheduling, transportation and parking. Investing \$42.5M in deferred maintenance in this property would only keep it operational in its current capacity and would not account for

renovations that would bring a former parochial school to an expanded, modern nursing laboratory building. Rather than invest that money to maintain inadequate space, the university would like the Commonwealth to divest from this campus and invest in STLA. STLA would be a purposely-built facility that would meet our current academic demands and industry standards, as recommended by DCAMM studies in 2007, 2013 and 2015 and Sightlines 2017.

#	Building Name	Primary Use	Campus	Funding Source
1	Harold E. and Marilyn J. Gassett Fitness Center	Academic and Student Services	O'Keefe Athletic Complex	Debt Funded Project and Private Donation*
2	North of Loring Parking Lot (Weir/Stanley property)	Parking	Central Campus	Debt Funded Project
3	Stanley Building	Academic and Administrative	Central Campus	Federal Grant
4	Viking Residence Hall	Student Services	Central Campus	Debt Funded Project
5	Renovation of Student Navigation Center	Student Services	Central Campus	Debt Funded Project
6	Renovation of university police department	Administrative	Central Campus	Debt Funded Project
7	Marsh Residence Hall	Student Services	Central Campus	Debt Funded Project
8	331 Lafayette Street Lease: Administrative Offices	Administrative	Other	Operating Budget
9	Renovation of Administration Building	Academic and Administrative	North Campus	Operating Budget
10	Sophia Gordon Center for the Creative and Performing Arts	Academic	North Campus	Debt Funded, Operating Budget, Private Donation, and DCAMM (27.5%)
11	Frederick E. Berry Library and Learning Commons	Academic and Student Services	North Campus	DCAMM
12	Parking Garage	Parking	North Campus	Debt Funded Project
Off Map	287 Lafayette Street Lease: School of Social Work	Academic	Other	Operating Budget

- Recent projects, leases, or acquired property
- Science Teaching Laboratory Addition
- Deferred maintenance to be addressed through renovations and South Campus program consolidation
- South Campus divestment

*Debt Funded Project: Project funded by MSCBA issued bonds that are repaid by student fees



Institutional Profile

About Salem State

Salem State's 163-year history reflects the growth of its mission and its vital role in the nation, the Commonwealth and the local community. From its beginnings as a teaching college to the large, diverse and comprehensive academic institution it is today, the university has remained true to the value of its founders, and continually seeks a forward path, adapting to society's changing needs while ensuring the intellectual and material well-being of the North Shore region of Massachusetts and beyond.

Located just 15 miles north of Boston, Salem State is one of the largest and most diverse state universities in the Commonwealth of Massachusetts and is an important partner in the economic, cultural and intellectual vitality of the greater north-of-Boston region. Situated in the historic seacoast city of Salem, Massachusetts on more than 115 acres and





five campuses, Salem State provides a diverse community of over 9,000 students, a high quality, student-centered education; one that prepares them to contribute responsibly and creatively to a global society and to serve as a resource to advance the region's cultural, social and economic development.

The university supports a full-time faculty of over 350 and offers 32 undergraduate degree programs in the liberal arts and sciences, health and human services, education, and business, along with graduate programs that offer degrees in 24 fields such as education, science, humanities, business, criminal justice, and nursing, among others. The university also has a continuing education division that offers both credit and non-credit programs.

Salem State's faculty represent a wide variety of academic institutions including the most prestigious in the country and the world. The university has been

recognized twice in the past five years as being among the top producing institutions of Fulbright Scholars. Faculty hold a deep commitment to teaching and learning and pride themselves on connecting with students at an individual level. Student learning opportunities are personal and collaborative, yet large enough to broaden students' understanding of their world.

The university's students hail from 28 states and 63 countries. The university is proud that 35 percent of its 2016 freshman class self-identified as being students of color. Salem State has over 65 student groups and clubs, 15 varsity teams along with intramural sports, and hundreds of student activities scheduled throughout the year. The university has a nationally award-winning residence life program. One-third of the undergraduate degree-seeking population, including two-thirds of the freshman class, lives on campus.



Located just 15 miles north of Boston, Salem State is one of the largest and most diverse state universities in the Commonwealth of Massachusetts and is an important partner in the economic, cultural and intellectual vitality of the greater north-of-Boston region.

Indicators of 21st Century Growth

	2006	2016	Change
Total Revenues	\$106.8M	\$164M	53%
Campus (number of buildings)	20	29	45%
Campus (total square feet)	1,152,221	2,046,328	78%
Degrees Awarded	1,434	2,214	54%
Graduation Rate*	37%	52%	+15%
Students of Color Enrollment	14.80%	29.40%	+15%
Hispanic/Latino Student Enrollment	4.80%	12.90%	+8%
Full-time Faculty	320	351**	10%
Resident Students (Housing Capacity)	1,404	2,282	63%
International Partnerships	3	25	733%
Community Service Hours	1,281	359,891	27995%

FTE Enrollment in Science and Healthcare Courses

Health Professions and Related Programs	350	548	57%
Physical Sciences	381	464	22%
Biology & Biomedical Sciences	330	489	48%



*Data is from 2007 and 2017 (projected)

**2015 IPEDS data

Points of Pride

Salem State University

As an institution, Salem State has made significant gains over the last ten years, and is poised to continue that trend through strategic investment in its people, its facilities, and the broader North Shore community. Specific achievements are highlighted here.

University Status—In 2010, Salem State College became Salem State University, a legislated change in status which reflected the large, comprehensive institution the university had become. University status brought greater recognition to the high quality of Salem State's academic programs and the many accomplishments of its faculty and students. With the university designation, Salem State expanded academic programming grounded in the expertise of its faculty and designed to address the changing needs of its community and workforce. Among many highlights, Salem State's School of Social Work was ranked #91 (of over 250 programs) by US News & World Report in 2016 and is the highest ranked public program in Massachusetts.

Increased Graduation Rates—Student success is Salem State's key goal. From 2007 to 2016, the graduation rate for baccalaureate students increased 15 percentage points—the largest change in the state university system. Salem State's six-year graduation rate for first-year freshmen increased from 37 percent in 2007 to 52 percent in 2016, with a graduation rate for transfer students at 67 percent. This growth reflects the exceptional efforts of faculty and staff to support students, and the university continues to set aggressive goals in the area of student success.

Diverse Community—Salem State University is the most diverse public university in the Commonwealth with over 29 percent of the student population from underrepresented backgrounds. In addition, over 35 percent of students identify as first generation college students. Salem State is known for its culture of

inclusion and, over the last five years, the university has expanded cultural and identity based programs and dialogues. Given population trends, the university is preparing to be a Hispanic Service Institution in future years.

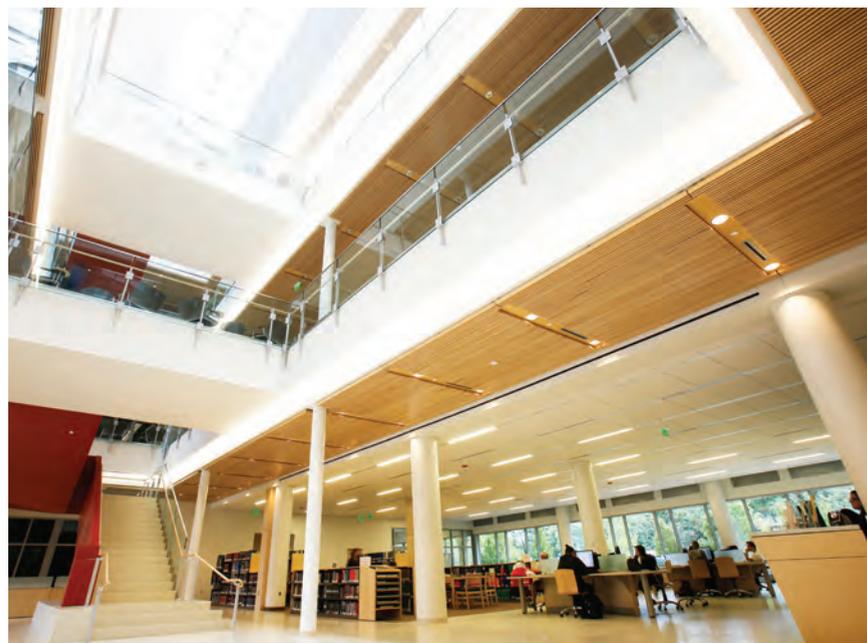
New State-of-the-Art Academic and Student Life Spaces—Changes to the physical campus over the past decade are profound. Nearly 760,000 square feet of new construction and renovations have been completed or are underway, bringing state-of-the-art academic and student life spaces to campus. Through the support of the Commonwealth of Massachusetts and generous donors, combined with resources of the university's operating budget, and issued debt to be repaid by student fees, over over \$250 million has been invested in campus improvements. Highlights of these changes include the Frederick E. Berry Library and Learning Commons, the Sophia Gordon Center for Creative and Performing Arts, the Harold E. and Marilyn J. Gassett Fitness Center, athletic fields and courts, and two residence halls that provide accommodations for nearly 900 students. Funding for a new Science Teaching Laboratory Addition is the top priority to meet the strong demand for science, healthcare and technology programming.

Residential Campus—In recent years, Salem State has shifted from a commuter campus to a more residential campus. Currently, one-third of the undergraduate degree-seeking population lives on campus, one-third lives in local neighborhoods, and the remaining third commutes from home. In addition to new residential facilities, Salem State has also added a new student life co-curriculum.

A Successful Comprehensive Fundraising Campaign that Raised Over \$26 Million—In December of 2016, Salem State announced the successful completion of the university's first comprehensive campaign. Exceeding its \$25 million goal, over \$26 million was raised during the campaign from more than 11,000 donors, with a remarkable 93 percent participation rate among faculty and staff. The funds resulted in the establishment of 48 new scholarships for students and much needed financial support for academic programs.



Changes to the physical campus over the past decade are profound... Funding for a new Science Teaching Laboratory Addition is the top priority to meet the strong demand for science, healthcare and technology programming.



Salem State University

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John David Keenan, JD

Presidential Review

2016-2017

Addendum

April 26, 2018

TABLE OF CONTENTS



Access/College Participation	2
Enrollment Rates	2
College Participation	3
Closing Achievement Gaps	5
College Completion/Student Success	10
Retention Rates	10
Graduation Rates	10
Healthcare & STEM	11

Access/College Participation

a. Enrollment Rates

Salem State has not been immune to the declining enrollment that has become a regional and national phenomenon. This decline can be explained by the decreasing numbers of high school graduates and the shifting demographics. In terms of our graduate program, we have witnessed a decline in our fall '17 headcount but a significant increase in credit hours during this same time (see Table I).

Table I: Fall and Annual Headcount and Credit Hours

Fall Headcount	Fall 2015	Fall 2016	Fall 2017
Fall Headcount Total	9,215	9,001	8,702
Undergraduate Headcount	7,499	7,346	7,110
Graduate Headcount	1,716	1,655	1,592
Fall Credit Hours	Fall 2015	Fall 2016	Fall 2017
Fall Credit Hours Total	106,608.0	105,702.5	103,879.5
Undergraduate Credit Hours	95,900.0	94,878.5	92,537.5
Graduate Credit Hours	10,708.0	10,824.0	11,342.0
Annual Unduplicated Headcount	FY 2015	FY 2016	FY 2017
Annual Headcount Total	11,633	11,497	11,057
Undergraduate Headcount	9,248	9,084	8,823
Graduate Headcount	2,338	2,342	2,166
Both Undergraduate & Graduate	47	71	68
Annual Credit Hours	FY 2015	FY 2016	FY 2017
Annual Credit Hours Total	229,879.5	228,130.5	225,245.0

Undergraduate Credit Hours	202,651.5	200,192.5	197,400.0
Graduate Credit Hours	27,228.0	27,938.0	27,845.0
Annual FTE	FY 2015	FY 2016	FY 2017
Annual FTE Total	7,889.2	7,835.0	7,738.3
Undergraduate FTE	6,737.1	6,649.6	6,560.8
Graduate FTE	1,112.8	1,123.8	1,114.4
Both Undergraduate & Graduate FTE	39.3	61.6	63.2

b. College Participation

Salem State continues to have the highest percentage of undergraduate students of color, combined, and also Latinx students, separately, for all of the Massachusetts State Universities. We share the top rank for African American students with Bridgewater State University (see Table II).

Table II: Total Enrollment by Race/Ethnicity

	2015	2016	2017
Salem			
White	75%	74%	71%
Latinx	11%	12%	14%
African American	8%	8%	9%
Other Known Race/Ethnicity	6%	6%	6%
Bridgewater			
White	81%	80%	79%
Latinx	6%	6%	6%
African American	8%	9%	9%
Other Known Race/Ethnicity	5%	5%	6%
Fitchburg			
White	86%	85%	84%
Latinx	6%	6%	7%
African American	4%	5%	5%

Other Known Race/Ethnicity	4%	4%	4%
Framingham			
White	81%	79%	76%
Latinx	8%	9%	10%
African American	5%	5%	7%
Other Known Race/Ethnicity	6%	7%	7%
Mass Maritime			
White	90%	89%	90%
Latinx	3%	4%	4%
African American	3%	2%	1%
Other Known Race/Ethnicity	4%	5%	5%
Mass Art			
White	76%	73%	72%
Latinx	10%	12%	12%
African American	4%	4%	5%
Other Known Race/Ethnicity	10%	11%	11%
MCLA			
White	81%	80%	81%
Latinx	6%	7%	6%
African American	8%	8%	8%
Other Known Race/Ethnicity	5%	5%	5%
Westfield			
White	81%	80%	79%
Latinx	9%	9%	10%
African American	5%	5%	5%
Other Known Race/Ethnicity	5%	6%	6%
Worcester			
White	80%	80%	79%
Latinx	7%	8%	8%
African American	7%	6%	6%
Other Known Race/Ethnicity	6%	6%	7%

In terms of the gender gap, the national trend continues. That is, the percentage of males enrolling in higher education continues to decline. Where for the last two years we held steady at 36%, FY 17 saw a 1% decrease (see Table III).

Table III: Gender distribution by percentage, Male

	2015	2016	2017
Salem	36%	36%	35%
Bridgewater	39%	39%	39%
Fitchburg	31%	30%	30%
Framingham	29%	30%	31%
Mass Maritime	86%	85%	85%
Mass Art	31%	29%	30%
MCLA	36%	35%	35%
Westfield	42%	37%	43%
Worcester	33%	34%	33%

Closing Achievement Gaps

We were extremely proud to be recognized by The Education Trust as one of the top ten institutions closing the achievement gap for Latinx students. We have set an ambitious goal of eliminating the achievement gaps (black-white, Hispanic-white, male-female) for six-year graduation rates over the next four years (see Graph I).

Trends: Closing Latino/a vs. White Gaps in Graduation Rates

Is progress being made in reducing gaps between Latino/a vs. White students in graduation rates, or are they worsening over time?

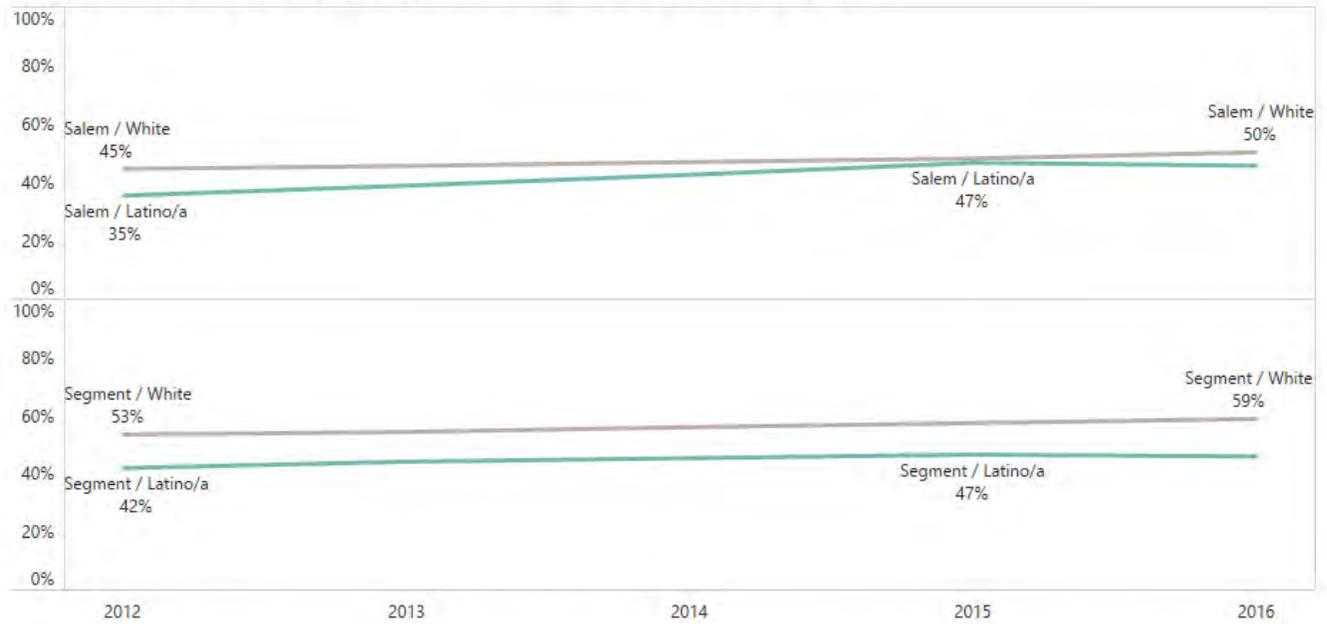
Choose Another Institution for Comparison:

Salem

Choose Another Comparison Set:

Latino/a vs. White

State Universities: Gaps in Six-Year Graduation Rate (2012 to 2016)



Graph I

The achievement gap by gender continued its increase. To that end, we are being intentional in addressing this ongoing issue as evidenced by the Men of Color Learning Community (referenced earlier in the report) and its 100% retention rate (see Graphs II and III).

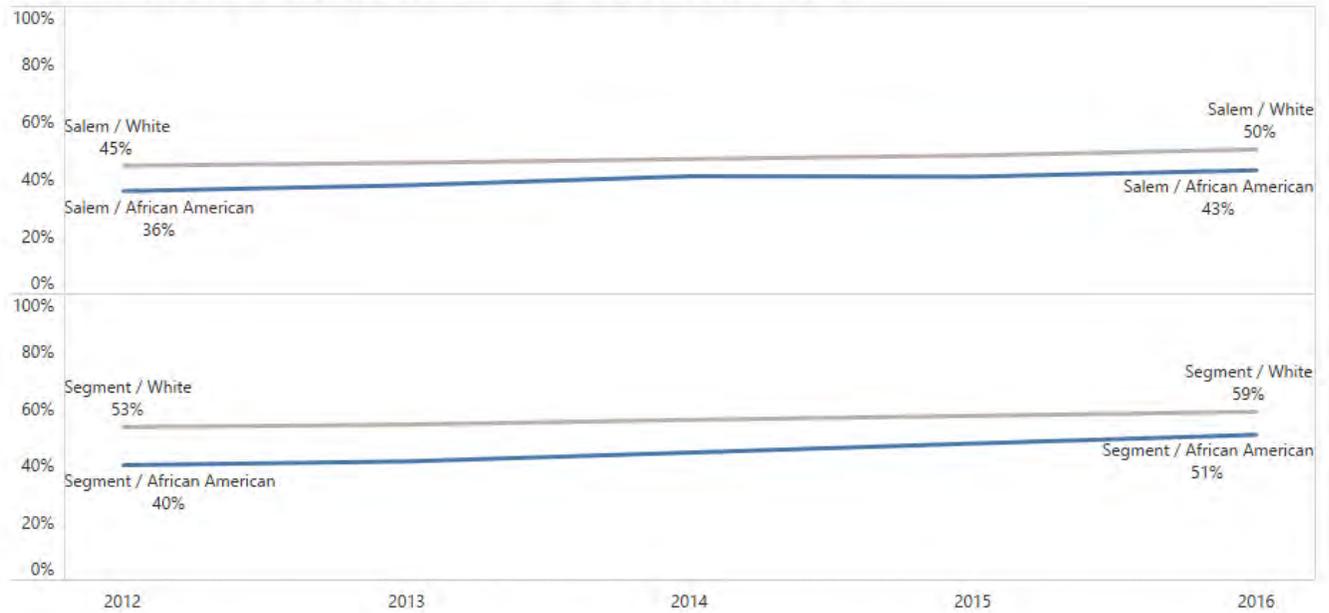
Trends: Closing African American vs. White Gaps in Graduation Rates

Is progress being made in reducing gaps between African American vs. White students in graduation rates, or are they worsening over time?

Choose Another Institution for Comparison:
Salem

Choose Another Comparison Set:
African American vs. White

State Universities: Gaps in Six-Year Graduation Rate (2012 to 2016)



Graph II

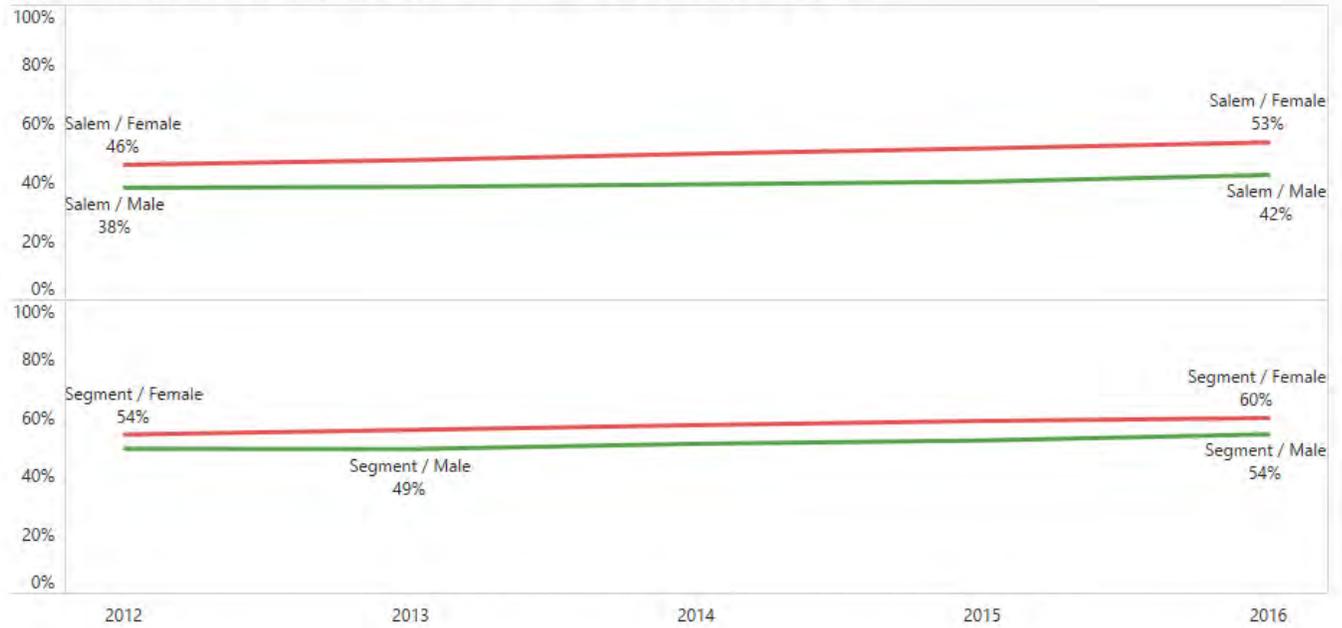
Trends: Closing Male vs. Female Gaps in Graduation Rates

Is progress being made in reducing gaps between Male vs. Female students in graduation rates, or are they worsening over time?

Choose Another Institution for Comparison:
Salem

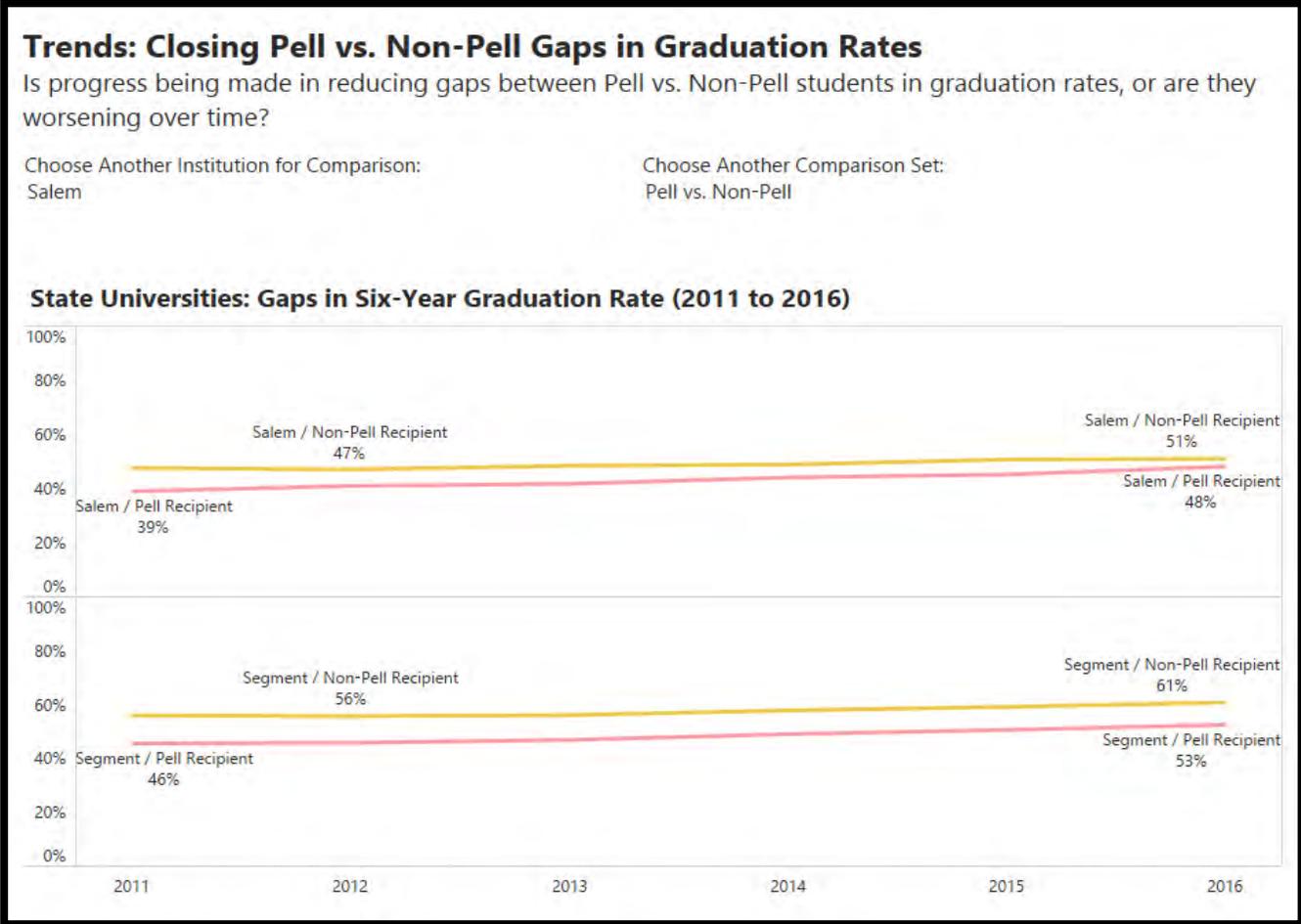
Choose Another Comparison Set:
Male vs. Female

State Universities: Gaps in Six-Year Graduation Rate (2012 to 2016)



Graph III

Salem State has one of the highest percentages of Pell eligible students in the state university system. Several factors contributed to the university’s success in closing the achievement gap for Pell eligible students. With the opening of the Student Navigation Center, we increased our efforts around financial literacy and expanded our work counseling financially at-risk students to assist them in managing the cost of attending the university. Efforts to inform parents about the business of being a student were increased to establish clearer expectations. Other institutional efforts to support student success included the Mapworks early warning survey and a robust First Year Experience program for students. MapWorks, in particular, has also provided valuable insight about this population, resulting in increased outreach and guidance around progression and resources (see Graph IV).



Graph IV

College Completion/Student Success

a. Retention Rates

After several years of steady progress, retention rates have slipped. Retention rates have been a priority for the university, as many resources have been devoted to increasing support services and providing a high quality living, learning experience. Resources have also gone into identifying why students are leaving. Some of the reasons include; 1) Affordability – some students with strong GPAs and low EFCs leave to attend a community college. Salem State hopes to counter this practice with our new financial aid leveraging strategy to focus aid where it is needed most. 2) Students with very low GPAs transfer to community colleges or drop out altogether. This occurrence is not surprising considering the shifting demographics in our catchment area. The university also completed the second year of a test optional pilot program to increase access to the institution for students who might not otherwise be considered (see Table IV).

Table IV: 1 Year Retention Rate – Salem State University

Fall Term	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
1 Year Retention Rate - Full Time Freshman	81.17%	79.86%	79.11%	77.17%
1 Year Retention Rate - Full Time Transfer*	81.77%	84.62%	82.19%	83.03%
*includes retained or graduated				

b. Graduation Rates

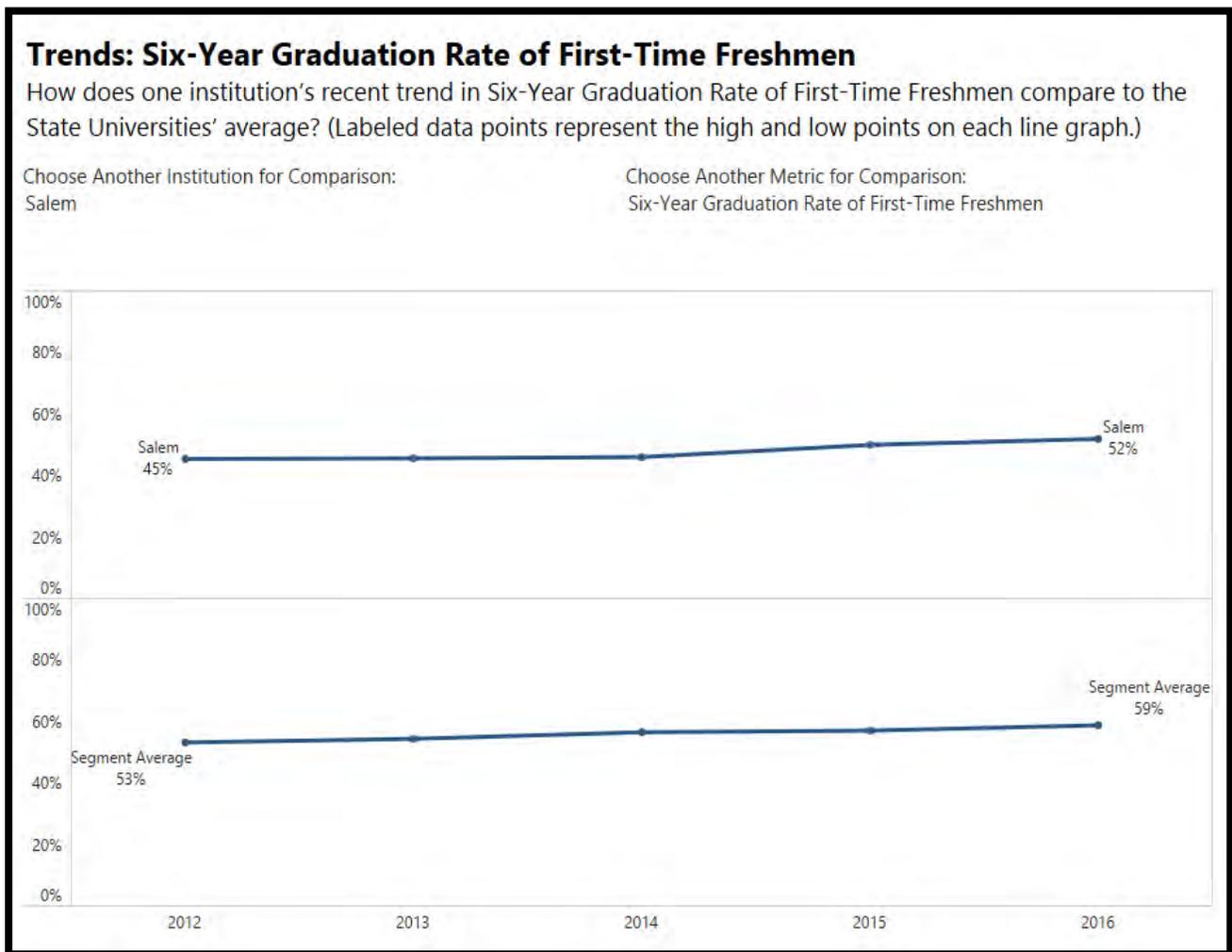
Graduation rates for first-time, full-time freshman and transfer students are at a six-year rate (six years from date of entry). We do continue to see progress in this area with the graduation rate for the class that entered in the fall of 2011 at 52%. Our next goal for 2021 is a 62 percent graduation rate for the class that entered in the fall of 2015 (see Table V and Graphs V and VI).

Increased outreach to community colleges by the Admissions Office, including the creation of a new Executive Director for Partnership Development and Outreach, have helped provide a more successful transfer experience for students to Salem State. As a result, we are working with students earlier in the process and assisting them with degree mapping while they are still at the community college, which has resulted in a much smoother transition to SSU, as well as keeping them on track to

graduate. In addition, the university's active involvement in statewide efforts to increase the portability of courses and maximize the transfer of credits also supports transfer student completion. Graduation rates have also been buoyed by targeted outreach from Financial Aid, Registrar and Academic Advising to students who are close to graduating in order to motivate them to complete or to assist them in crossing the finish line.

Table V: 6 Years Graduation Rate - Salem State University

Fall Term	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
6 Years Graduation Rate - Full Time Freshman	45.90%	49.90%	51.52%	52.07%
6 Years Graduation Rate - Full Time Transfer	64.26%	67.46%	63.76%	63.02%



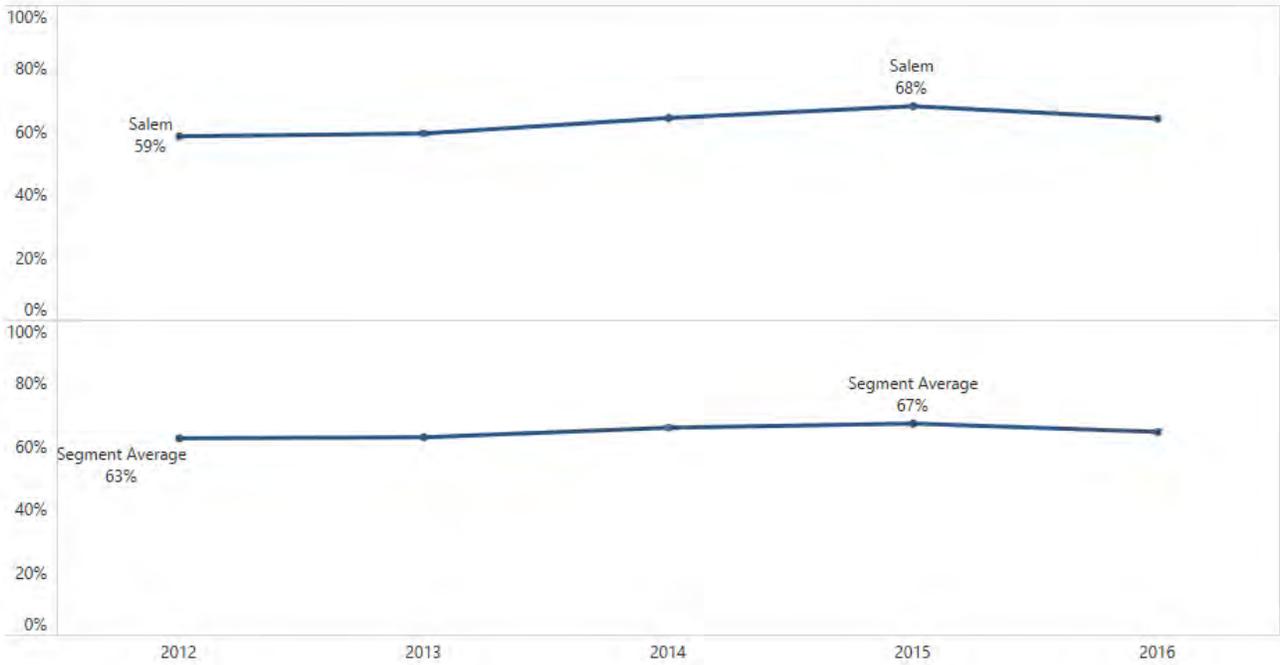
Graph V

Trends: Six-Year Graduation Rate of Transfer Students

How does one institution's recent trend in Six-Year Graduation Rate of Transfer Students compare to the State Universities' average? (Labeled data points represent the high and low points on each line graph.)

Choose Another Institution for Comparison:
Salem

Choose Another Metric for Comparison:
Six-Year Graduation Rate of Transfer Students



Graph VI

c. Healthcare & STEM

The demand for majors that require laboratory courses far exceeds current facilities. Salem State routinely caps nursing and biology majors due to the limits of available lab space. Over 83% of students who apply for the nursing program are not accepted. For the past few years, we have closed admission to biology in April due to capacity challenges and we increased the GPA requirement, which limits access to this major for students in our region. Salem State has also seen an increase in the demand for the healthcare studies major, while not yet offering a clinical component due to the university lacking sufficient lab space. Frankly, Salem State could grow this major even more if the facilities to support the growth were available. In addition, the necessity for support courses in other majors with lab requirements, as well as for general education courses in the sciences, demonstrates the urgent need to increase lab capacity. It is not possible to quantify how many students may be turned away due to the limits of current facilities; however, increasing both the quantity and the caliber of university labs will pay dividends in maximizing undergraduate access, retention, and graduation (Table VI).

Table VI: Healthcare & STEM vs. Other Fields

	2015	2106	2017
Salem			
Health Care	13%	11%	11%
STEM	6%	8%	9%
Other Fields	81%	81%	80%
Bridgewater			
Health Care	2%	1%	2%
STEM	8%	9%	8%
Other Fields	90%	90%	90%
Fitchburg			
Health Care	9%	10%	9%
STEM	13%	13%	17%
Other Fields	78%	77%	74%
Framingham			
Health Care	8%	6%	8%
STEM	12%	13%	15%
Other Fields	80%	81%	77%

Mass Maritime			
Health Care	0%	0%	0%
STEM	71%	76%	81%
Other Fields	29%	24%	19%
Mass Art			
Health Care	0%	0%	0%
STEM	0%	0%	0%
Other Fields	100%	100%	100%
MCLA			
Health Care	2%	1%	1%
STEM	14%	22%	13%
Other Fields	84%	77%	86%
Westfield			
Health Care	2%	3%	3%
STEM	8%	10%	9%
Other Fields	90%	87%	88%
Worcester			
Health Care	24%	26%	24%
STEM	13%	11%	13%
Other Fields	63%	63%	63%

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
a. Faculty and Staff	Increase the percentage of full-time faculty/staff of color to 35% across all departments by 2019.	Assess intentional recruitment efforts and create support systems for the aforementioned recruited faculty and staff. Field candidates who have experience with working students from marginalized communities	Human Resources	Update university on the following dates: February 15th 2018 September 15th 2018 January 15th 2019	Staff of color increased from 18.2% to 19.7% (Fall 2016-Fall 2017) and faculty increased from 18.5% to 21.1% during the same period.
b. University Police	Increase staff of color within the University Police Department. Mandatory implicit bias training on race, gender and sexuality.	Assess recruitment efforts and update the university community. Ensure training on cultural competency is provided to University Police staff.	Gene Labonte University Police	Offered in the Summer 2018	In June 2018, the Anti-Defamation League/United States Holocaust Memorial Museum will conduct Anti-Bias and Diversity Training for SSU Police.
c. The Office of Institutional Diversity & Equity (OIDE)	Create institutional policies to address systemic inequalities, bias incidents, and campus climate at Salem State University.	Establish the inaugural Office of Institutional Diversity & Equity ran by the Chief Diversity Officer. Discontinue the use of "Inclusive Excellence" (OIE) Brand	President Keenan	Replace OIE with OIDE by February 26th	A Bias Response Team was established by President Keenan in April 2018. The purpose of the team is to evaluate, address, and recommend proactive measures that will assist us in understanding and eliminating institutional cultural

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
					<p>norms that allow bias incidents to occur within our community.</p> <p>The Climate Study Implementation Team was established in November 2017 to review the Campus Study results and propose policies and initiatives to improve campus climate.</p>
d. Vice President (VP) and Chief Diversity Officer (CDO)	Appointment of a VP and CDO	Hire an individual as VP/CDO to run The OIDE with adequate full time administrators and support staff to address institutional concerns.	President Keenan Chair of Search Committee appointed by President Keenan	Full time CDO position filled by Fall 2018	One year interim appointment named, effective June 3, 2018 (R. Comage)
e. CDO Hiring Process	BBP Representation in the hiring process for CDO.	Two (2) Black, Brown, and Proud (BBP) Representatives on the search committee.	Chair of Search Committee appointed by President Keenan	Begin the processes February 15th 2018	N. Bryant will lead the search committee for the new VP/CDIO. There will be BBP representation on the committee.
f. Ensure Accountability to Students	Monthly meetings between BBP and University Leadership	Schedule a two hour meeting per month with University Leadership, BBP.	President Keenan's Office	February: One (1) March: Two (2) April: One (1)	BBP/University Leadership meetings were held in

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
				May: N/A	February and April 2018.
g. Diversity Power Dynamics and Social Justice General Education Requirement	Ensure courses apart of the Diversity Power Dynamics and Social Justice core curriculum are taught by qualified professors.	BBP involvement in committee review process of classes applying to the core curriculum.	Provost Silva Keja Valens (Faculty Curriculum Committee Rep.)	Effective Immediately Spring 2018	18 new courses have been approved for the coming academic year (AY18-19); another 15 courses are in the faculty governance approval process for future implementation. See attached list.
h. Equity Review Process	Include questions regarding experience working with students of color within higher education.	Periodically publish outcomes of the Equity Review Process to the campus community	Scott James Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	Effective Immediately Spring 2018	Equity reviews have been implemented at key stages of searches to ensure appropriate diversity representation. This has provided opportunities for HR and the Inclusive Excellence Office to share best practices and other tools and resources to help committees and hiring managers attract candidates from diverse backgrounds.

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
i. Students of Color Learning Community (LC)	Develop a Women of Color LC, Men of Color LC, and Asian LC to aid in the academic support & retention of students of color.	Establish & sustain a Women of Color LC, Men of Color LC , and Asian LC offered at the beginning of every academic year to incoming Freshman Implement requirements to link LC to BEES/Brotherhood.	First Year Experience Mathew Chetnik	Offer to Fall 2018 Freshman class during Summer 2018 Orientation	FY Learning Communities will be offered to Women of Color and to Men of Color in AY 18-19.
j. Honors Program	Increase amount of students of color in the honors program.	Review and amend efforts to recruit students of color to the honors program.	David Silva Lee Brossoit Scott Nowka	Planning to being Spring 2018 for rollout beginning Summer/Fall 2018	An increase is expected in AY18-19. See attached document for details.
k. Training	Faculty be provided training opportunities designed to increase individual cultural competency.	Encourage faculty to attend university sponsored training by providing them "Service to Community" credit.	David Silva	In Spring 2018 provide BBP documentation of training opportunities provided to faculty/staff	Inclusive Excellence Ambassadors being launched in Summer 2018. In addition, Academic Affairs, in conjunction with faculty leaders and the Inclusive Excellence Office, has set up a two-day diversity and inclusion training for faculty for May 23 and 24, 2018.

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
					<p>Additional trainings include:</p> <ul style="list-style-type: none"> • The Power of Respectful Language (1,068 employees totaling 168.4 hours as of 5/4/18) • Uncovering Implicit Bias (1,034 employees totaling 288.6 hours as of 5/4/18) • Culture Coaching: The Power to Transform Leaders and Institutional Climate (February 2018) • Black Student Success on Your Campus: Increase Recruitment, Retention, Engagement, & Completion (February 2018; a DVD is available for sign-out) • Sharing Stories: Fostering Empathy (April 2018, Navigator Center staff of 50 employees)

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
l. Workshops	Members of the campus provide workshops in the area of diversity, racial equity, and social justice.	Bi-annual workshops on diversity for faculty, staff and administration and encourage attendance. Supporting and providing.	Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	In Fall 2018 provide BBP a list of workshops	See Category K for May Professional Development training details.
m. Bias Response Protocol	Develop and refine a Bias Response Protocol in the website.	Form a Bias Response Team comprised of students, faculty, and staff to assess and efficiently respond to on-campus bias incidents.	Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	By end of Spring 2018 Begin revised Bias Response Protocol/Team	Bias Response Working Group has developed a workflow, and Pres. Keenan has charged the Bias Response Team which will oversee this work.
n. Scholarships for Students of Color	Raise university scholarship funds that will benefit students of color.	Create and advertise scholarship opportunities for incoming students of color.	Cynthia McGurren & The Office of Institutional Diversity & Equity	Effective Immediately Spring 2018	The President's Diversity Scholarship was established in January 2018, made possible through fundraising in honor of President Keenan's inauguration and the MOST Scholarship; \$5,270 in funds will be awarded in FY19. There are also two one-time awards available for next

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
					<p>academic year: one for a male student of color and one for Latino student/s.</p> <p>A five-figure funding proposal to support the Brotherhood and Bees has been submitted to a private foundation and we are awaiting a response.</p>
o. Budget Review	Increase the retention rate of students of color through reallocation of resources within the university.	Assess the budget of departments that focus on students of color (CAE, Student Advocacy, and Diversity and Multicultural Affairs Office).	President's Executive Council	By the end of Spring 2018, provide BBP with assessment summary	FY19 budget still under review.
p. Student Success Initiatives	Provided increased funding for Diversity and Multicultural Affairs office.	Provide BEES and Brotherhood adequate budget for programs involving student retention.	President's Executive Council	By the end of Spring 2018, provide BBP with assessment summary	FY19 budget still under review.
q. Orientation	Intensive dialogue on Diversity, power dynamics and equity during Summer Orientations.	Mandatory diversity session(s) with the goal of increasing cultural competency.	Carla Panzella Lauren Hubacheck	In the second meeting of Spring 2018, provide BBP with Orientation plans for 2018	Programming expected as part of 2018 orientation.

Itemized Chart of 2018 BBP Demands

Status as of 5.10.18

Category	Demand	Charge	Responsibility	Timeline	Status
r. Space Allocation	Larger location for the Center of Diversity and Cultural Enrichment.	Provide BPP tentative architectural design of future center space within Ellison Campus Center Building.	Carla Panzella Rebecca Comage	Spring 2018 provide BBP with floor plans Begin implementation design implementation Summer 2018	Larger space has been identified.
s. Culturally Engaging Campus Environment	In applying the CECE model, increase full time staff within the Diversity and Multicultural Affairs (DMA) office.	Hire two full time Administrators in DMA. One as the Racial Equity Program Coordinator (PC), the other as the Gender and Sexuality PC.	Rebecca Comage	Spring 2018 behind hiring process. Fill the two full time positions by Summer 2018	DMA transitioned to LEAD with restructured staffing of additional Associate Director and Program Coordinator (subject to funding).
t. Counseling within Diversity and Multicultural Affairs (DMA)	Provide DMA office a full time counselor able to assist their success.	Hire a full time Multicultural Counseling Specialist dedicated to students of color within the center.	Interim Co-Chief Diversity Officer The Office of Institutional Diversity & Equity	Spring 2018 behind hiring process. Fill the full time position by Summer 2018	Under review.

General Education: Diversity, Power Dynamics, and Social Justice Courses

Item #	Description	Type of Action	Date Received	Sent to Committee	Approved	AUC Approved	Sent to Pres/Provost	Approved by Pres/Provost	Effective Date
18:021	SOC240-Contemporary Social Problems	Change in Course-DPDS	6/28/2017	Curriculum	CC17/18:06	17/18:04	1/31/2018	2/10/2018	FALL2018
18:022	SOC345-Race and Ethnicity in Society	Change in Course-DPDS	6/28/2017	Curriculum	CC17/18:06	17/18:04	1/31/2018	2/10/2018	FALL2018
18:033	ENL253-American Ethnic Literatures Since WWII	Change in Course-DPDS	9/11/2017	Curriculum	CC17/18:05	17/18:03	12/18/2017	1/9/2018	FALL2018
18:034	ENL352-U.S. Latino/a Literature	Change in Course-DPDS	9/11/2017	Curriculum	CC17/18:05	17/18:03	12/18/2017	1/9/2018	FALL2018
18:040	POL303-Grassroots Politics	Change in Course-DPDS	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:041	POL309-Introduction to Feminist Theory	Change in Course-DPDS, W-II	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:042	POL327-Race in American Politics	Change in Course-DPDS	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:043	POL328-Immigration and US Politics	Change in Course-DPDS	9/27/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	SPRING2019
18:049	THE101-Introduction to Theatre Arts	Change in Course-DPDS	9/29/2017	Curriculum					
18:050	IDS232-American Identities	Change in Course-DPDS	9/29/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	FALL2019
18:079	SWK270-Understanding Diversity and Cultural Competence in Human Services	Change in Course-DPDS	10/5/2017	Curriculum					
18:086	MCO230-Media and Race	New Course-DPDS	10/10/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:087	COM274-Gender, Media, and Communication	Change in Course-DPDS	10/10/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:089	COM304-Mass Media and Society	Change in Course-DPDS	10/10/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:124	DAN330-Hip Hop Dance History	New Course-DPDS	10/12/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	FALL2018
18:125	DAN320-Modern Dance History	New Course-DPDS	10/12/2017	Curriculum	CC17/18:08	17/18:04	1/31/2018	2/10/2018	FALL2018
18:127	DAN100-Introduction to Dance	Change in Course-DPDS	10/12/2017	Curriculum	WITHDRAWN	-----	-----	-----	-----
18:147	SPN382-Latinx Immigration: Context and Representation	Change in Course-DPDS	10/14/2017	Curriculum					
18:148	SPN420-US Latino Literature in Spanish	Change in Course-DPDS	10/14/2017	Curriculum					
18:155	BHS201-Health Disparities in the U.S. in the 21st Century	New Course-CS, DPDS	10/15/2017	Curriculum					
18:162	ENL354-Native American Literature	Change in Course-DPDS	10/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:163	ENL255-African American Literature I	Change in Course-DPDS	10/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:164	ENL256-African American Literature II	Change in Course-DPDS	10/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:165	OCT407N-OT Analysis & Intervention I	Change in Course-DPDS	10/16/2017	Curriculum					
18:180	GPH379-Environmental Justice	Change in Course-DPDS	10/16/2017	Curriculum					
18:190	PSY333-Psychology of Gender	Change in Course-DPDS	10/30/2017	Curriculum					
18:191	PSY344-Topics in Social and Cultural Diversity	Change in Course-DPDS	10/30/2017	Curriculum					
18:192	PSY355-African American Psychology	Change in Course-DPDS	10/30/2017	Curriculum					
18:210	ENL290-Fictions of Gender and Sexuality	New Course-DPDS	11/16/2017	Curriculum	CC17/18:07	17/18:04	1/31/2018	2/10/2018	FALL2018
18:214	CRJ360-Racial Minorities, Crime, and Criminal Justice	Change in Course-DPDS	12/1/2017	Curriculum					
18:215	CRJ240-Bias Crime	Change in Course-DPDS	12/1/2017	Curriculum					
18:216	CRJ365- Gender & the Criminal Justice System	Change in Course-DPDS	12/1/2017	Curriculum					
18:235	IDS385-Community Organizing	Change in Course-DPDS	2/20/2018	Curriculum					
18:242	THE101-Introduction to Theatre Arts	Change in Course-DPDS	2/27/2018	Curriculum					



**Commonwealth Honors Program (CHP)
at Salem State University**
(as of April 26, 2018)

CHP Admissions Data, Spring 2018 → Class of 2022

Self-ID Category	Admitted		Deposited	
	N	%	N	%
Asian	35	11%	4	10%
Black/African-American	28	9%	1	3%
Capeverdean	2	1%	0	0%
Hispanic	36	11%	4	10%
None chosen	7	2%	0	0%
Two or more	12	4%	0	0%
White	204	63%	31	78%
Total	324	100%	40	100%

Final figures are pending:

1. *final orientation (August)*
2. *confirmed enrollment by each student in at least one honors section (September)*

Winter/Spring 2018 Outreach (to current first-year students) -- completed

Provost Postcard: to all SSU first-year students with F17 qualifying GPA
 Follow-up E-mail: to students of color who received the postcard
 Informational Breakfast: to students of color who received the follow-up e-mail
 Result: Six (6) new students of color to enter the CHP F18 (as sophomores)

Planned Outreach (for AY18-19)

- NEW: Change in CHP scholarship program: broader coverage
- NEW: Targeted outreach of students of color during fall '18 for entrance to the CHP in spring '19 – continued consultation with Professor S. Oliver
- REPEAT: Postcard + E-mail + breakfast sequence in January 2019 (eligibility based on fall '18 grades)
- NEW: Outreach to advisees of qualified students of color so that advisors can encourage advisees



NOMINATING COMMITTEE

Minutes

May 23, 2018

Present: Trustees Katzman (chair), Chisholm and Murphy. Also present and participating Board Secretary Montague.

Absent: None

Chair Katzman called the meeting to order at 2:50 pm and called for all nominations. One nomination was received from Trustee Scott for Paul Mattera, chair and Rob Lutts, vice chair. No floor nominations were made. Chair Katzman hearing no further discussion called for a motion which was duly offered by Trustee Chisholm, seconded by Trustee Murphy

VOTED: **The Nominating Committee of the Board of Trustees of Salem State University recommends that the Board re-elect Paul Mattera as chair and Rob Lutts as vice chair of the Board of Trustees for FY2019 , effective July 1, 2018.**

With no further business to conduct and upon a motion duly made by Trustee Chisholm, seconded by Trustee Murphy, it was unanimously

VOTED: **To adjourn**