



Juniata College

P E N N S Y L V A N I A

◆ 1876 ◆

# Self-Study Design

Middle States Commission on Higher Education

Submitted to:

Dr. Sean McKittrick

Vice President, Middle States Commission on Higher Education

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## Institutional Overview

Juniata College is an independent, coeducational, and residential liberal arts college. The College was founded in 1876 by members of the Church of the Brethren to prepare individuals “for the useful occupations of life.” The first classes were held on April 17, 1876 in a second story room over a local printing shop. Three students attended, two of them women. In 1879, classes were moved to Founders Hall on the present campus, located in Huntingdon, Pennsylvania which has a current population of approximately 7,000 and is located in the mountains of scenic central Pennsylvania, midway between Interstate 80 and the Pennsylvania Turnpike. In 1896, Juniata was accredited as a four-year liberal arts institution.

From its inception, Juniata has devoted itself to liberal education within the context of ethical values and engaged citizenship. As such, Juniata's mission is to “provide an engaging personalized educational experience empowering our students to develop the skills, knowledge, and values that lead to a fulfilling life of service and ethical leadership in the global community.”

In 2015, newly selected President, Dr. James Troha, led the development of our most recent strategic plan, *Courage to Act*, which affirmed our current mission statement and continued commitment to the personalized approach the institution has operationalized to provide an engaging experience for all our students. *Courage to Act* was designed to strengthen areas key to distinguishing Juniata, including our general education curriculum, the interplay between curricular and co-curricular life, how we engage technology, our reputation, and our institutional resources.

The key areas of focus of *Courage to Act* are:

- the **scholarship** inherent in our academic offerings, the flexibility of our signature Program of Emphasis system, and our experience-driven approach to inspiring learners;
- the **community** and its mix of challenge and support, commitment to diversity and inclusion, respect for peace and service, and focus on wellness;
- the **distinctiveness** of our location, academic offerings, and mission;
- our **resources** and the ways they enable focus on our mission and vision;
- and our **presence** as a college of high academic standards and performance transitioning from regional to international in reach, recruiting, and impact.

Soon after the adoption of *Courage to Act*, the Juniata community developed, approved, and adopted a set of institutional learning outcomes (ILOs) that would operationalize our mission and guide future activities. These ILOs have served as the basis of a completely new core curriculum and state that a Juniata graduate will demonstrate the following:

### **Knowledge and Skills**

- The skills needed to engage effectively with and adapt to a changing world
- Depth of knowledge in an academic field
- Critical engagement with and respect for multiple cultural traditions and human diversity

### **Intellectual Engagement**

- Analytical and creative thinking, critical questioning, and examination of evidence
- Intellectual curiosity and an openness to exploring challenging questions

### **Interdisciplinarity**

- Integration of knowledge and skills from multiple disciplinary approaches to address questions or problems
- Different ways of knowing about the self, aesthetics, human cultures, and the social and natural worlds

### **Ethical Behavior**

- Knowledge of multiple ethical traditions and an informed vision of a just society
- The capacity to act ethically with empathy, honesty, and responsibility

### **Engagement with the Self and the World**

- Collaborative work in cultural settings from local to global
- Engaged citizenship and respectful interactions
- Understanding of how a holistic and intentional approach to life fosters wellbeing

Juniata is recognized among the nation's top private colleges due to its educational quality, commitment to access, and distinctive environment. Juniata draws students from more than 35 U.S. states and dozens of nations in Africa, Asia, Europe, Oceania, and South America. Exceptional programs in the sciences; innovative business and international studies offerings; signature programs in peace studies, museum studies, and integrated media arts; and experience-driven humanities offerings pair with a robust general education curriculum focused on interdisciplinarity, as well as local and global engagement. Students use the College's Program of Emphasis (POE) system to work with two faculty advisers to define and shape their education. The POE is more flexible than a major and empowers Juniata students to pursue varied interests and talents. Varying

from year to year, one-fourth to one-third of Juniata students author individualized POEs, effectively designing their own area of study under the guidance of their two advisors.

Currently, Juniata has approximately 1300 full-time, undergraduate degree-seeking students. Of these, 989 (76%) identify as White, non-Hispanic, 98 (8%) as Hispanic/Latino, 52 (4%) as Black or African American, 44 (3%) as two or more races, 36 (3%) as Asian, 27 (2%) as unknown, 4 (< 1%) as American Indian or Alaska Native, and 1 (< 1%) as Native Hawaiian or other Pacific Islander. The percent of Black students has trended slightly upward over time from 2.13% in 2010 to 3% in 2020. The percent of Hispanic students had doubled from 2% in 2010 to 4% in 2020. While both of these trends mirror Pennsylvania state demographics, percentages remain underrepresented for both groups.

About 9% of Juniata's students are international students. While this percentage has remained relatively stable over the last 10 years, the total number and percentage has declined from a high of 213 in 2013 (11% of our student body) to 143 (9%) in 2019 and 125 (8%) in 2020.

Historically, Juniata has had a strong emphasis in health professions, with a growing interest in business related fields. The most common areas of study are (2020 graduates):

- Biological and Biomedical Sciences (19%)
- Business, Management, Marketing, and Accounting (15%)
- Chemistry and Biochemistry (7%)
- Psychology (7%)
- Environmental Science & Studies (7%)
- Information Technology and Computer Science (6%)

The overall size of the student body has decreased by about 300 from our last self-study in 2013. This decrease mirrors the population decline in the Northeast, from where the majority of Juniata's students come. The demographic challenges have necessitated a reduction in institutional expenses complemented with creative revenue generation. The College has worked to reduce the size of the faculty and staff, reorganize responsibilities and roles, adjust benefits, and critically evaluate operating expenses while growing existing summer online programs, expanding graduate programs, and developing new undergraduate programs that have market demand. These changes have provided opportunities but have also tested the morale of the campus community.

The COVID-19 crisis also stressed the campus community, much like the rest of higher education. After completing the 2019-2020 academic year with all students and employees remote, Juniata spent the 2020 spring and summer offering faculty professional development opportunities so that all courses for the 2020-2021 academic year could be offered in-person and online, synchronously and asynchronously, known as the HyFlex model. Student support offices redesigned their services

so they could be provided in flexible, safe, and socially distant ways. The campus planned a robust strategy for safe living and learning, backed by a rigorous COVID-19 testing protocol and communication plan that routinely reminded the campus community of conduct and behavioral expectations. This preparation afforded Juniata the opportunity to successfully deliver a fully residential experience during the 2020-2021 academic year. The HyFlex model adopted allowed Juniata to support students' degree progress even if they were unable to be residential for any reason at any time. Of the 1302 students active during fall of 2020, 164 participated fully online from various places around the world. This created many opportunities to learn about and respond to the challenges of the online students, with institutional data to demonstrate that the remote students had lower rates of academic success and more non-academic obligations when compared to the on-campus students.

The murder of George Floyd and the subsequent social justice protests also impacted our community. Students authored a letter during the summer of 2020 challenging the College to do better in support of BIPOC students, and a group of faculty, promoting anti-racism, also began meeting to push for greater equity and inclusion across campus. Faculty worked during the summer and throughout the fall to increase focus on racial justice and equity across the curriculum, making changes to the First-Year Experience for all students and changing the U.S. Experience general education requirement to address more directly intersectionality and equity. This work also led to the formation of a summer group on racial justice and to the creation and charge of a new Council on Equity, Diversity, and Inclusion. There is still much work to do, however, Juniata has worked diligently to evolve our focus and commitment to equity, diversity, and inclusion over time, outwardly recognized in 2015 by receiving The *INSIGHT into Diversity* Higher Education Excellence in Diversity (HEED) Award.

Despite the demographic challenges, Juniata has maintained a strong academic profile and continues to be recognized for its academic excellence. Juniata is currently ranked 84 in *US News* for national liberal arts colleges, up from 105 in 2014-2015. The incoming student academic profile has also remained strong with median GPA and SAT scores rising from 3.85 and 1160 in 2013 to 4.00 and 1200 in 2020. The above achievements represent a deliberate focus on maintaining academic quality in the face of demographic head winds, and the College achieved national recognition through participation in the American Talent Initiative, only available to institutions that enroll a specified number of Pell eligible students and graduate them at more than 70% in six years. In 2020, Juniata received the Carnegie Foundation's Elective Community Engagement Classification as recognition of its institutionalization of community engagement.

Given all of this, Juniata continues to innovate and invest in the future while striving to be creatively efficient and true to the mission and values of being a small, private, and inclusive residential liberal arts institution. The implementation of the 2015 strategic plan *Courage to Act*

provided the focus and resources necessary to improve our teaching and learning environment, strengthen our brand, and engage the entire Juniata community in the largest comprehensive campaign in Juniata’s history. The \$115 million *BELIEVE Campaign* is already supporting student scholarships, endowed faculty positions, and campus infrastructure. Recent infrastructure investments have had a direct impact on the student experience, including a new residence hall, an integrated media and studio arts building, renovations to high traffic areas in two of the largest academic buildings and student hub including the additions of new elevators to enhance accessibility for students and guests, a new tennis and soccer complex, and a significant transformation of the library into a modern learning commons will begin in the near future. Our 2023 self-study will venture to tell a story of continuous improvement through the lens of our focus on mission, initiatives derived from our recent strategic plan, and a current strategic planning effort that is now underway.

## Institutional Priorities to be Addressed in the Self-Study

Appointed in the fall of 2020, Steering Committee Co-Chairs, Dr. Philip Dunwoody, Associate Provost for Institutional Effectiveness, and Anne Wood, Assistant Vice President and Chief Information Officer, worked with the President, Dr. James Troha, and Provost, Dr. Lauren Bowen, to identify institutional priorities, based on the College’s strategic plan *Courage to Act* to be used for the purposes of self-study. Three initial priorities were proposed to and accepted by the President, vetted by the Senior Leadership Team, and shared with the Board of Trustees Education Committee for further discussion and feedback. Upon creation of the Steering Committee, the proposed priorities were further discussed and refined before being accepted as the institutional priorities of focus. These priorities, the timeline, and process were also shared with the full Juniata community at a Presidential Open Forum.

For purposes of self-study, our institutional priorities are:

- To Provide an Engaging and Personalized Teaching and Learning Experience
- To Strengthen Student Success and Outcomes for All Students
- To Ensure the Long-Term Viability of Our Institution through Planning, Assessment, Realignment of Resources, and Revenue Generation

The following chart demonstrates how these priorities are aligned to the strategic plan through the five pillars as referenced in our institutional overview: scholarship, community, distinctiveness, resources, and presence.

<i>Courage to Act</i> Strategic Plan Pillars	Provide an Engaging, Personalized Teaching & Learning Experience	Strengthen Student Success and Outcomes for All Students	Ensure Long-Term Viability of Our Institution: Resource
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			Alignment & Revenue Generation
SCHOLARSHIP	X	X	
COMMUNITY	X	X	
DISTINCTIVENESS	X	X	X
RESOURCES			X
PRESENCE	X		X

To demonstrate continuous improvement as related to the Middle States Standards of Accreditation, the chart below shows how we have chosen to primarily align the institutional priorities to the standards. It is acknowledged that the standards not checked are also likely embedded into our institutional priorities. This alignment was used in the formation of research questions outlined later in this document.

	Middle States Standards for Accreditation	Provide an Engaging, Personalized Teaching & Learning Experience	Strengthen Student Success and Outcomes for All Students	Ensure Long-Term Viability of Our Institution: Resource Alignment & Revenue Generation
I	Mission & Goals	X	X	X
II	Ethics & Integrity		X	
III	Design & Delivery of the Student Learning Experience	X	X	
IV	Support of the Student Experience		X	
V	Educational Effectiveness Assessment	X		X
VI	Planning, Resources & Institutional Improvement			X
VII	Governance, Leadership & Administration			X

### Intended Outcomes of the Self-Study

The intended outcomes of our self-study are to:

- Demonstrate how Juniata College currently meets the Commission’s Standards for Accreditation and Requirements of Affiliation and verify institutional compliance with accreditation-relevant federal regulations developed by the United States Department of Education,



- Focus on continuous improvement in the attainment of our mission and institutional priorities,
- Engage our community in an inclusive and transparent self-appraisal process that actively and deliberately seeks to involve members from all areas of the community, and
- Align with and inform a new institutional strategic planning process that will support an ongoing framework for continuous improvement.

## Self-Study Approach

Juniata’s self-study report will be organized using the priorities-based approach to best support an evaluation of continuous improvement as related to our mission and outlined in our current strategic plan. This approach will be used to tell a compelling story while also assessing gaps and looking for opportunities that will inform a new strategic planning process that is being conducted parallel to our self-study.

## Organizational Structure of the Steering Committee & Working Groups

Juniata’s self-study process is being led by an institutional steering committee, guided by two presidentially appointed co-chairs. The President, Dr. James Troha, and Provost & Professor of Politics, Dr. Lauren Bowen, are serving ex-officio, with Dr. Bowen also serving as the Accreditation Liaison Officer (ALO). President Troha appointed Self-Study Steering Committee chairpersons, Dr. Philip Dunwoody, Associate Provost of Institutional Effectiveness & Professor of Psychology, and Anne Wood, Assistant VP/CIO, who have the necessary backgrounds and expertise to lead the self-study process from beginning to end. Co-Chairs Dunwoody and Wood worked with the institution’s Senior Leadership Team to identify a core group of individuals who have agreed to serve as members of the Steering Committee. The following members were selected based on familiarity with our institutional mission, goals, and priorities, having a sense of commitment to assessment and improvement, and having broad institutional perspective:

*Hannah Bellwoar, Associate Professor of English, Director of General Education*

*Kathryn Blake, Director Juniata College Museum of Art*

*Matthew Damschroder, VP Student Life & Dean of Students, Retention*

*Caitlin Murphy, Acting Dean, International Programs*

*Tracy Grajewski, Chief Human Resources Officer, Co-Chair of the Strategic Planning Committee*

*Sally Oberle, Director of Advancement Services*

*Reginald Onyido, Acting Director Equity, Diversity & Inclusion*

*Matthew Powell, Assoc. Professor of Geology, Director of Institutional Research*

*Brenda Roll, Asst. to Assistant VP & CIO, Technology Dept. Coordinator*

Bethany Sheffield, *Executive Assistant to the President*

Steven Simons, *Sr. Assoc. Director of Admissions*

James Tuten, *Professor of History*

Wei-Chung Wang, *Assoc. Provost for Academic Initiatives, Professor of Business & Economics*

Karla Wisner, *Controller & Chief Financial Officer*

Sarah Worley, *Assoc. Professor of Communication, Director of Community Engaged Teaching and Learning*

### **Charge of the Co-Chairs**

- Lead work of the Steering Committee
- Establish charges and provide gap analysis and reporting templates
- Edit and synthesize working group reports
- Communicate and engage with the Senior Leadership Team, the President, and the Board of Trustees
- Develop and deliver a communication plan that informs key constituents about the importance of the process, garners support for the process, and solicits input
- Play point on writing/synthesizing report
- Organize visits

### **Charge of the Steering Committee**

- Provide input to the self-study design to ensure that we will perform a critical analysis of our institutional goals and priorities and compliance with the Commission's standards for accreditation, requirements of affiliation, and applicable federal regulatory requirements
- Facilitate an inclusive self-study process that will support the strategic planning process
- Establish and charge working groups using a structure that will support a strong relationship between the Steering Committee and each working group
- Assign institutional priorities, standards, and criteria to be addressed to the working groups in a way that does not duplicate effort
- Approve a comprehensive and robust set of research questions proposed by the working groups to ensure adequate coverage of institutional priorities, standards, and criteria in a way that does not duplicate effort
- Ensure evidence identification is adequately and strategically distributed in the working groups to eliminate duplication of effort
- Support working groups by providing information and guidance for identifying critical issues, gathering appropriate evidence, and maintaining accountability for deliverables
- Oversee a comprehensive gap analysis, address areas marked for improvement, ensure a robust evidence inventory, and synthesize working group recommendations that advance the institution

- Ensure timetable with adequate milestones is implemented
- Contribute to the development and completion of our self-study report
- Host visits

To ensure adequate communication and interaction between the Steering Committee and working groups, Steering Committee members have been designated to serve as co-leaders of our five working groups. Our working groups, overarching research questions, and examples of evidence are outlined below. The [Appendix](#) provides a more comprehensive list of research questions.

Working Group #1: Provide an Engaging, Personalized Teaching and Learning Experience

Primary Standards to Evaluate: Standards I, III, V

Co-Leaders: Hannah Bellwoar, Sarah Worley

Steering Committee Supporting Member: Caitlin Murphy, Phil Dunwoody

Designated Evidence Manager: Brenda Roll

Consider how Standards I, III, and V are linked to Juniata’s Mission (and ILOs), Strategic Plan, and the specific institutional priority to “Provide an Engaging, Personalized Teaching and Learning Experience.” In looking at the criteria found within these standards, the following lines of inquiry emerged.

- How does Juniata ensure the curriculum reflects our mission and goals as a liberal arts institution?
- What evidence is there that students are learning the essential outcomes described in our curriculum? What are the processes in place to ensure meaningful and sustainable assessment of student learning across the institution?
- How are High-Impact Practices supported and integrated into the student experience?
- What equity gaps exist regarding the student educational experiences and how are they addressed?
- How are faculty and other appropriate professionals evaluated, mentored, and supported to ensure that they are sufficient in number and provided with resources to deliver a quality educational experience consistent with our mission and goals?

Examples of Potential Evidence

- Academic Catalogue
- Course Syllabi
- Program/Department Review/Program Prioritization Data
- Institutional Learning Outcomes & General Education Curriculum
- Samples of student portfolios and transcripts
- Data on number of students participating in High Impact Practices

- Personnel Evaluation Committee Guidelines
- Faculty Manual
- Scholarship of Teaching and Learning (SoTL) Work

Working Group #2: Strengthen Student Success & Outcomes for All Students

Primary Standards to Evaluate: Standards II, III, IV

Co-Leaders: Matthew Damschroder, James Tuten

Steering Committee Supporting Member: Reggie Onyido

Designated Evidence Manager: Anne Wood

Consider how Standards II, III, and IV are linked to Juniata’s Mission, Strategic Plan, and the specific institutional priority to “Strengthen Student Success & Outcomes for All Students.” In looking at the criteria found within these standards, the following lines of inquiry emerged.

- What processes are leveraged and how successful has the institution been in creating communities that reflect and support student diversity?
- What processes are leveraged and how successful has the institution been in designing intentional student experiences that meet institutional learning outcomes and the mission?
- How has the College made critical changes to enhance educational environments?

Examples of Potential Evidence

- Community Based Organization (CBO) Partnerships, development of EDI-related positions
- Summer Advisory Committee, Establishment of EDI Council, Embedding EDI responsibilities within positions, Dean of EDI position, Bias Response Team reboot, disaggregated consideration of student outcomes, curricular/pedagogical equity adjustments
- Study abroad, short-term and faculty led study abroad, exchange programs, EDI offerings, speakers/lectures, curricula/SOTL, diversification of enrollment
- Community Engaged Learning/Internships, Local Engagement Requirement, Mentored Research
- IPEDs – Graduation rates by diversity cohorts – compared to peers
- Diversity participating in Study Abroad and other educational opportunities
- Outcomes data; career, grad school

Working Group #3: Ensure the Long-term Viability: Planning, Assessment, & Alignment of Resources

Primary Standards to Evaluate: Standards I, VI, VII

Co-Leaders: Kathryn Blake, Matt Powell  
Steering Committee Supporting Member: Tracy Grajewski  
Designated Evidence Manager: Bethany Sheffield

Consider how Standards I, VI, and VII are linked to Juniata's Mission, Strategic Plan, and the specific institutional priority to "Ensure the Long-term Viability of Juniata in our Planning, Assessment, & Alignment of Resources efforts." In looking at the criteria found within these standards, the following lines of inquiry emerged.

- In what ways does the organizational structure/chart reflect and communicate Juniata's mission and goals across the organization, with particular emphasis on student learning?
- How is research and resulting data aligned with and driven by questions we need to answer for institutional improvement and what is our capacity for doing so?
- By what process do we choose how to invest in human and physical infrastructure needs to meet our institutional goals, and what has been the outcome of recent investments? How effective is this process?
- How does governance and organizational communication ensure the successful implementation of goals, the fulfillment of key initiatives, and allocation of resources?
- How effectively are our financial resources aligned with institutional priorities, and what is the process by which that alignment happens?

#### Examples of Potential Evidence

- Performance management documentation and its alignment with the "Courage to Act" strategic plan
- Administrative program review process/Departments & Programs Committee
- Scorecard/President's annual performance review with the Executive Committee of the Board (related to benchmarks for the institution)
- Organization Chart
- Job descriptions for positions (<https://www.juniata.edu/offices/human-resources/current-employees/job-descriptions/>)
- Faculty Handbook
- Budget process from CFO, Senior Leadership Team (where decisions about priorities are made and reviewed)
- Board of Trustees by-laws and committee charters
- President's town hall recordings, presentation files
- Campus master plan, other Facilities planning documents, Advancement's priorities

- IT Governance

Working Group #4: Ensure the Long-term Viability: Sustaining and Diversifying Revenue

Primary Standards to Evaluate: Standards VI, VII

Co-Leaders: Steven Simons, Wei-Chung Wang

Steering Committee Supporting Member: Karla Wiser

Designated Evidence Manager: Sally Oberle

Consider how Standards VI and VII are linked to Juniata's Mission, Strategic Plan, and the specific institutional priority to "Ensure the Long-term Viability of Juniata by Sustaining and Diversifying Revenue." In looking at the criteria found within these standards, the following lines of inquiry emerged.

- What is the institution's capacity for creating new revenue streams and enhance existing ones?
- What efforts have been made to sustain a consistent enrollment of traditional full-time undergraduate students, which make up the corps of our revenue?
- What is the institution's current financial strategy to maintain or improve our credit profile?
- What efforts are underway to evaluate the long-term viability of our current business model?
- Which structures / processes exist to sustain or enhance revenue directly related to the retention of students already enrolled?
- What is the impact of the COVID-19 pandemic on the COVID mitigation effort on the viability of the institution?

Examples of Potential Evidence

- Program development – academic programs (undergrad and grad), co-curricular experiences (sports, mock trial, e-sports), auxiliary enterprise (Parkhurst), conferences/events, rental income
- Enrollment / CBO initiatives. Pricing task-force. Brand / Marketing work
- Financial Statements, Management Letters, S&P credit rating profile, DOE composite score, compliance reports (bond covenants)
- PIVOT work
- Student Services / Academic Support / EDI
- Sustained in-person instruction, hybrid flexible teaching model, IEI Grant
- Advancement Goals and Campaign/Giving Reports

Since the management of evidence is central to an efficient and successful self-study process, the Steering Committee agreed to establish a working group whose charge is solely to manage and coordinate our identification, assessment, and collection of evidence.

#### Working Group #5: Evidence Management

Charge: Manage and coordinate the identification, assessment, and collection of evidence as related to the Middle States Standards of Accreditation, Verification of Compliance, and Requirements of Affiliation.

Co-Leaders: Sally Oberle, Bethany Sheffield

Steering Committee Supporting Member: Brenda Roll, Anne Wood

The Evidence Inventory section of this design provides more information on how this working group will support our self-study process.

#### **General Charge of the Working Groups:**

- Based on the institutional priority and standard and criteria assigned, propose lines of inquiry/research questions to the Steering Committee for approval.
- Use provided templates for identifying sources of information, data, processes, and procedures to identify relevant evidence and perform a gap assessment. Report to the evidence management working group for synthesis.
- Per the direction of the co-chairs and based on synthesis of the evidence management working group, evaluate and assess institutional strengths and weaknesses in relation to the assigned institutional priorities, standards, and criteria and identify opportunities for continuous improvement. Present this, as scheduled, in updates to the Steering Committee.
- When questions arise about how to limit areas of inquiry or opportunity for improvement and innovation to a manageable number, go back to lines of inquiry/research question to determine the extent to which they directly relate to mission, priorities, and standards.
- Hold regular meetings and engage the campus community as necessary to identify, collect, and analyze evidence and draft final reports for the Steering Committee in accordance with the established timetables.
- Collect evidence as assigned by the evidence management working group.
- Use and cite evidence collected to indicate clearly how the standard and its criteria are met or addressed.
- Prepare a final report that includes an overview of the working group's charge, lines of inquiry, collaboration, connections, evidence inventory approach, assessment information used, written report that addresses the lines of inquiry, areas of strength, opportunities for improvement and innovation, and institutional strategies for improvement.

## Guidelines for Reporting

The Steering Committee meets bi-weekly for 90 minutes to ensure adequate time for committee-based discussion and decision making. A working timeline has also been in place since the co-chairs were identified. As the self-study process unfolds, additional details and milestones are added to the timeline to ensure that the outcomes of our Self-Study process are achieved. Since working groups are co-led by members of the Steering Committee, routine verbal reports will be provided in addition to more formal written reports, with the first written report due on May 31, 2021. The purpose of this report is to assess initial strengths, challenges, and opportunities for improvement and to begin recommending strategies for improvement. This will allow either implementation of strategies where feasible or sharing with the Strategic Planning Committee for incorporation into the forthcoming strategic plan. Final reports from the working groups will be due in early 2022, followed by a draft of the self-study report being shared with the campus community in the spring of 2022. The current list of products to be completed by the working groups and Steering Committee are:

Self-Study Design Prep	Lines of Inquiry; Collaborators; Examples of Evidence	Working Groups	3/25/21
Self-Study Design	MSCHE VP Liaison	Steering Committee	3/31/21
Evidence Assessment	List Evidence to Support Standard/Criteria/Priority	Working Groups	4/30/21
Evidence Reports	Report Strengths, Opportunities, Gaps	Working Groups	5/31/21
Evidence Collection	Gather Evidence	Working Groups	Ongoing
Draft WG Reports	Review with Steering Committee	Working Groups	11/1/21
Final WG Reports	Approve by Steering Committee	Working Groups	1/31/22
Draft Self-Study Report	Feedback from Campus Community	Steering Committee	4/1/22
Draft Self-Study Report	Share with Board of Trustees/MSCHE Team Chair	Steering Committee	10/1/22
Self-Study Report	Share with MSCHE Team	Steering Committee	1/31/23

Working group reports are of central importance to the self-study process. Their purpose is to serve as a formal method of reporting the results of the working group's efforts and will include the following sections.

### **Overview of Working Group's Charge:**

A brief description of the standards and priorities assigned to the working group and their alignment with one another and the institution's mission.



**Description of Lines of Inquiry:**

Overview of the lines of inquiry addressed by the working groups and how these enable the working group to fulfill its charge and the institution's self-study outcomes.

**Collaboration, Connections, and Evidence Inventory Approach:**

Overview of the working group's collaborations with those refining the Evidence Inventory and, where applicable, Verification of Compliance process, and a list of documentation to be included in the Evidence Inventory. In addition, a description of collaborative discussions with members of other working groups and, where needed, strategies for avoiding undue duplication.

**Assessment Information Utilized:**

A description (or listing) of assessment information utilized to conduct analyses consistent with the lines of inquiry.

**Analytical Report:**

An analytical report that addresses lines of inquiry.

**Areas of Strength:**

Based on analytical report, evidence-based areas of strength consistent with the working group's charge and assigned standards and priorities.

**Opportunities for Improvement and Innovation:**

Based on analytical report, evidence-based opportunities for improvement and innovation consistent with the working group's charge and assigned standards and priorities.

**Initial Strategies on Continuous Quality Improvement:**

Suggested institutional strategies for improvement.

## Organization of the Final Self-Study Report

The Steering Committee will create a concise, clear, and objective Self-Study Report that is no longer than 200 double-spaced or 100 single-spaced pages. The self-study report will be structured as follows:

**Executive Summary:** The final Self-Study Report will include an executive summary, which provides a brief description of major findings and opportunities for improvement and innovation identified in the self-study.

**Introduction:** This section will include a brief summary of the history, type, size, and student population of Juniata; a brief discussion of what led us to choose our institutional priorities; and a description of the approach the institution has chosen for self-study. A paragraph outlining how the remaining chapters are organized by priority and how the Evidence Inventory will be used will also be included.

**Chapter 1:** This chapter will cover the institutional priority of *Providing an Engaging, Personalized Teaching and Learning Experience* and narrate a clear connection with Standards for Accreditation I, III, and V. We will also include:

- Cross-references to relevant materials in other parts of the report and within the Evidence Inventory;
- Analytically-based inquiry and reflection;
- Conclusions, including strengths and challenges, with references to appropriate criteria; and
- Opportunities for ongoing institutional improvement and innovation.

**Chapter 2:** This chapter will cover the institutional priority of *Strengthening Student Success & Outcomes for All Students* and narrate a clear connection with Standards for Accreditation II, III, and IV. We will also include:

- Cross-references to relevant materials in other parts of the report and within the Evidence Inventory;
- Analytically-based inquiry and reflection;
- Conclusions, including strengths and challenges, with references to appropriate criteria; and
- Opportunities for ongoing institutional improvement and innovation.

**Chapter 3:** This chapter will cover the institutional priority of *Ensuring the Long-Term Viability of Our Institution through Planning, Assessment, Realignment of Resources, and Revenue Generation* and narrate a clear connection with Standards for Accreditation I, VI, and VII. We will also include:

- Cross-references to relevant materials in other parts of the report and within the Evidence Inventory;
- Analytically-based inquiry and reflection;
- Conclusions, including strengths and challenges, with references to appropriate criteria; and
- Opportunities for ongoing institutional improvement and innovation.

**Chapter 4:** This chapter will address all Standards and Criteria that do not fall within the scope of Chapters 1-3. We will also include:

- Cross-references to relevant materials in other parts of the report and within the Evidence Inventory;
- Conclusions, including strengths and challenges, with references to appropriate criteria; and
- Opportunities for ongoing institutional improvement and innovation.

**Conclusion:** This section will provide a summary of the major conclusions reached and our self-identified opportunities for improvement and innovation. The conclusion will also outline initial plans for the institutional initiatives that will address identified opportunities, as well as concluding observations on how this process is being used to continuously improve within the context of Juniata's mission and goals.

## Verification of Compliance Strategy

As a part of the reaccreditation process, The Middle States Commission on Higher Education, as a federally recognized accreditor, will verify our institutional compliance with accreditation-relevant federal regulations developed by the United States Department of Education. The Commission will verify institutional compliance in the following areas:

1. Student identity verification in distance and correspondence education
2. Transfer of credit policies and articulation agreements
3. Title IV program responsibilities
4. Institutional records of student complaints
5. Required information for students and the public
6. Standing with State and other accrediting agencies
7. Contractual relationships
8. Assignment of credit hours

Working Group 5: Evidence Management will identify and work with campus offices to gather the necessary policies and/or procedures that are (1) in writing, (2) approved and administered through applicable institutional processes, (3) accessible to constituents, and (4) reflect current practice. Members of this working group are outlined in the Organizational Structure of Steering Committee and working groups section of this document.

We will use the Institutional Federal Compliance Report for submission, which is available at [www.msche.org](http://www.msche.org) and include supporting evidence that is combined into a single, bookmarked PDF file. The Institutional Federal Compliance Report will be uploaded in conjunction with all other self-study materials, no later than six weeks prior to our scheduled on-site Evaluation Visit.

## Self-Study Timetable & Communication Plan

Timeframe	Activity/Task	Communication	Audience	Method
September 2020	Establish Co-Chairs			
October - November 2020	Participate in SSI			
November 2020	Presidential invitations to Steering Committee Members	Campus Kick-Off - Purpose, Importance, Outcomes, & Institutional Priorities	Campus Community, Board of Trustees, Alumni Council	President's Forum, February Board Update, Alumni Council Meeting
January 2021	Zoom Call with VP Liaison	Update Steering Committee regarding Call with VP Liaison	Steering Committee	Meeting
January - February 2021	Assemble Working Groups			
March 25-30, 2021	Complete Self-Study Design and submit to Middle States	Share Self-Study Design Document	Middle States VP Liaison; Board of Trustees - Education Committee	Electronic Distribution of Document
April 16 2021	Self-Study Preparation Visit by VP Liaison and Self-Study Design Review	Review of Self-Study Process and Design	Campus Community, Board of Trustees, Steering Committee	VP Liaison Virtual Visit via Zoom
June - September 2021	Revisions and Acceptance of Self-Study Design			
April - December 2021	Working Groups gather and analyze data and provide progress reports	Share/Discuss potential strengths, gaps, opportunities with campus	Campus Community, Steering Committee	Campus Focus Groups; Student Focus Groups
January 2022	Final Working Group Reports Due			
January - May 2022	Team Chair Selected; Fall 2022 Visit and Spring 2023 Dates Chosen			
April 2022	Self-Study Report Draft shared with Campus	Share/Discuss potential strengths, gaps, opportunities with campus	Campus Community; Board of Trustees	Campus Focus Groups; Student Focus Groups; Board Meetings
May - September 2022	Self-Study Revisions and Campus Review	Share/Discuss potential strengths, gaps, opportunities with campus	Campus Community	Campus Focus Groups
September - November 2022	Draft Self-Study Report shared with Team Chair	Share Self-Study Report Draft	Middle States Team Chair	Electronic Distribution of Document

September - November 2022	Team Chair Visits Campus for Preliminary Visit and Draft Report Review	Update of Visit; Board Approval of Draft	Steering Committee, Campus Community, Board of Trustees	President's Forum, October Board Update
January 2023	Self-Study Report Finalized and Shared with Campus	Share Self-Study Report; Board Approval of Report	Campus Community, Board of Trustees	Electronic Distribution of Document
February - March 2023 (6 weeks prior)	Upload Self-Study Report, Verification of Compliance, Evidence Inventory	Upload all required documents to Middle States	Middle States	Electronic Distribution of Documents
March - April 2023	Sunday – Wednesday Team Visit (determined when chair is determined)			
April - May 2023	Finalize Report, Prepare Formal Response, Submit to Commission	Upload all required documents to Middle States	Middle States	Electronic Distribution of Documents
June/November 2023	Commission Committee on Evaluation Report Meets and Determines Action	Action Determined	Steering Committee, Campus Community, Board of Trustees	Email Update from Co-Chairs, Provost, President, Steering Committee

\*visits after April 15th are acted on by the Commission in November

## Evaluation Team Profile

Juniata seeks the following characteristics and expertise in our evaluation team:

### Team Chair

The College would prefer a president who has led a small college or university, maybe in a rural area and that the team chair is NOT at an institution that might be considered a top “cross app” school (listed in the table below).

### Team Members

The College would prefer:

- A member(s) who is doing, or has done, equity, diversity, and inclusion work at an institution similar to Juniata;
- A member(s) who has enrollment management experience at small, liberal arts colleges;
- At least one CFO;
- An academic leader (dean, AVP, CAO) with experience in development of new programs (undergraduate/graduate); and
- An individual with IT experience.

Historically, Juniata has had a strong emphasis in health professions with a growing interest in business related fields. Our most common areas of study are (2020 graduates):

- Biological and Biomedical Sciences (19%)
- Business, Management, Marketing, and Accounting (15%)
- Chemistry and Biochemistry (7%)
- Psychology (7%)
- Environmental Science & Studies (7%)
- Information Technology and Computer Science (6%)

For reference, the following table lists our official peer and aspirant institutions, as well as those we share significant application overlap with.

Peer College	Aspirant Colleges	Application Overlap Institutions
Beloit College (WI)	Gettysburg College (PA)	Pennsylvania State University (PA)
Austin College (TX)	Dickinson College (PA)	Susquehanna University (PA)
Allegheny College (PA)	Centre College (KY)	Allegheny College (PA)
Drew University (NJ)	University of the South (TN)	Lebanon Valley College (PA)
Augustana College (IL)	Franklin & Marshall College (PA)	Elizabethtown College (PA)
Knox College (IL)	Union College (WA)	Gettysburg College (PA)
College of Wooster (OH)	Whitman College (WA)	Lycoming College (PA)
Washington & Jefferson College (PA)	Kenyon College (OH)	
St. Lawrence University (NY)		
Millsaps College (MS)		
Ursinus College (PA)		
Wofford College (SC)		
Susquehanna University (PA)		
Washington College (MD)		
Muhlenberg College (PA)		
Moravian College (PA)		
McDaniel College (MD)		
Lycoming College (PA)		
Elizabethtown College (PA)		

## Evidence Inventory & Management

Juniata's approach to populating and maintaining the evidence inventory as part of the Middle States process is to assign the collection, organization, and analysis of evidence related to the Middle States Standards of Accreditation, Verification of Compliance, and Requirements of Affiliation to a working group dedicated to this task (Working Group 5). Each member of Working Group 5 has also been assigned as a "designated evidence manager" and embedded as a supporting member of one of the other four working groups focused on institutional priorities and their accompanying Middle States standards. In this way, the members of Working Group 5/the designated evidence managers are able to contribute to and observe the overall process with an eye on evidence gathering and inventorying while being mindful of any duplication of effort as well as gaps that emerge.

Following the working groups' recent contributions to the self-study design in developing research questions and providing examples of evidence, Working Group 5 recommends that the next step for the working groups would be to continue that work with a focus on identification of evidence and data. Prior to the conclusion of the spring 2021 semester, as research questions are finalized, each working group will begin to expand upon their most recent exercise and consider the full list of evidence, data, and information that they envision necessary to demonstrate compliance with standards and criteria and in support of their institutional priority through an evidence evaluation and assessment:

### **Evidence Organization & Evaluation**

- Each of the four working groups centered on institutional priorities will have a specified folder in their working group's materials within Juniata's Middle States library in Microsoft 365 that will serve as that group's evidence repository.
- Within each individual working group evidence repository, Working Group 5 will also place a working group evidence inventory spreadsheet that will assist each working group in listing and reviewing documents/evidence that support each of their research questions and institutional priority and how these fulfill various standards.
  - **REQUIRES GATHERING:** As potential evidence is considered in response to the working groups' research questions and needs to be identified by or sought from others in the campus community, please make an entry in the evidence inventory spreadsheet on the "Evidence Gathering" tab.
  - **AVAILABLE EVIDENCE:** As known and available evidence is considered in response to the working groups' research questions, the proposed files should be listed in the working group's evidence inventory spreadsheet on the "Available

Evidence” tab and added to the respective group’s evidence repository folder by any member of the working group or steering committee chairs.

- Each working group’s designated evidence manager will then work, as part of their role with Working Group 5, to pull evidence from their working group’s inventory to contribute to and build the steering committee’s comprehensive evidence inventory/library (location listed below). The comprehensive inventory will be organized by standards, requirements of affiliation, and compliance.
- Once the initial evidence assessment is completed by each working group, Working Group 5 will begin to map the existing items from each working group’s evidence inventory to the steering committee’s comprehensive evidence inventory by standards and criteria. Overall gaps will then be identified and shared with the steering committee, and collection of remaining evidence will be delegated at this point in time to seek efficiencies and to avoid duplicate requests.

### **Ongoing**

- The steering committee’s comprehensive evidence inventory/repository, which will be populated by the designated evidence managers and steering committee chairs, will ultimately be used to populate the MSCHE portal.
- Each working group’s designated evidence manager will collaborate as part of Working Group 5 to continue to add and build additional items into the comprehensive evidence inventory as the process unfolds.
- Working Group 5 will also identify and gather evidence to support the Verification of Compliance and Requirements of Affiliation.

### **Working Group Evidence & Document Workflow**

1. Working Groups Evidence Repository: Within each working group folder in the working documents section of the Middle States library, there will be an evidence repository subfolder:



Middle States > Documents > General > WorkingDocs

Name	Modified
Old	December 1, 2020
Self-Study Design	5 days ago
WG1	5 days ago
WG2	5 days ago
WG3	5 days ago
WG4	5 days ago
WG5	A few seconds ago

Middle States > Documents > General > WorkingDocs > WG3

Name	Modified
WG3 Evidence Repository	A few seconds ago

- Working Groups Evidence Inventory: Each working group's evidence repository subfolder will also contain an Excel file to be used as that group's evidence inventory, documenting that group's progress of associating documents as evidence supporting the working groups' standards, criteria, and research questions:

Middle States > Documents > General > WorkingDocs > WG3

Name	Modified
WG3 Evidence Repository	A few seconds ago

Documents > General > WorkingDocs > WG3 > WG3 Evidence Repository

Name	Modified	Modified By
WG3 Evidence Inventory.xlsx	A few seconds ago	Sheffield, Betha

#### File Types:

All files cited or referenced in the working group evidence inventory should be converted to a pdf, where appropriate (for Word or other word processing file types). However, while documents are still being edited, it is fine to continue to use M365 to collaborate. Excel files should maintain the .xlsx file type.

- Working Group Evidence Inventory Spreadsheet: As evidence is collected by each working group, it should be named appropriately and saved in the working group's evidence

repository. The information for the file or document should be listed in the group's evidence inventory as follows:

	A	B	C	D	E	F	G	H	I	J
1	Name of Doc.	Pub. Date	Doc. URL/Location	Page # (if applicable)	Doc. Description	Uploader Name	Standard	Criteria	ROA	Compliance
2										
3										
4										

Name of Doc.: the actual file name

Pub. Date: the publication date in year, month and date

Doc. URL/Location: hyperlink to the document

Page #: add if applicable.

Doc. Description: short description

Uploader Name: the last name of the person uploading the file.

Please indicate all that are applicable: Standard (please do not use Roman numerals due to sorting) & Criteria, Requirements of Affiliation, and/or compliance verification.

### File Naming Conventions

A description of the document should lead the file name along with the document creation date: EX: strategicplan\_updated\_20170600.pdf

File names should be as clear and descriptive as possible avoiding jargon and be related to the criterion or research question as applicable.

All dates include four numbers for the year and two numbers for month and day. EX: 20210219. (Use 00 if the exact month or day is unknown.) Use lowercase letters for the file name except when the description is a proper noun. Do not use spaces within document names. Instead, underscores should be used to replace spaces between words and numbers. Do not include slashes, dashes, or extra periods within the file name.

4. Central Evidence Inventory: Each designated evidence manager will then work with the co-leaders of their working groups and the other evidence managers (Working Group 5) to move and inventory files to the steering committee's comprehensive evidence repository.

### **For Consideration:**

We plan to use the Self-Evaluation Rubric as a guide to evaluate quality of the documentation gathered. <http://www.msche.org/wp-content/uploads/2019/10/evidence-inventory-institutional-self-evaluation-rubric.pdf>. When further refining the Evidence Inventory up to and after the On-Site Evaluation Visit, we should consider the following questions in the interest of ensuring focus of the information provided and suitable referencing for those outside the institution:

- When references to the Evidence Inventory are made in the Self-Study Report (or vice versa), are these connections clearly communicated or referenced in the Report itself?
- Is the documentation in the Evidence Inventory complete, appropriately representative and comprehensive so institutional representatives and peer evaluators can effectively and confidently use the information?
- For documents that are necessary but appear complex to an outside reader, is it possible to annotate this information and/or provide excerpts of policies, procedures, reports and other information?
- Does the documentation align with right-to-privacy regulations and respect the privacy of individuals?

The development and continuous renewal of the Evidence Inventory empowers institutions to create a long-term resource; once completed, it can serve as a tool for evaluating ongoing compliance with the Commission’s expectations.

## Appendix

Working Group Questions are listed in full (macro and micro) below. The big-picture (macro) questions are also listed above in the design and numbered below. Standard and Criteria are listed after each micro question as (St. X/Cr. Y).

### Working Group #1: Provide an Engaging, Personalized Teaching and Learning Experience

Primary Standards to Evaluate: Standards I, III, V

Co-Leaders: Hannah Bellwoar, Sarah Worley

Steering Committee Supporting Member: Amy Frazier-Yoder, Phil Dunwoody

Designated Evidence Manager: Brenda Roll

Consider how Standards I, III, and V are linked to Juniata’s Mission (and ILOs), Strategic Plan, and the specific institutional priority to “Provide an Engaging, Personalized Teaching and Learning Experience”. In looking at the criteria found within these standards, the following lines of inquiry emerged.

1. How does Juniata ensure the curriculum reflects our mission and goals as a liberal arts institution?
  - How well is the teaching and learning experience at Juniata representative of the mission we’ve chosen, and how well is it serving students? Prospective students? (St. I/Cr. 2)
  - What relevant curricular and cocurricular educational experiences (GE, POE) relate/map to our ILOs (clearly stated goals)? (St. V/Cr. 1) (St. III/ Cr. 3)

- How recently were the mission and goals (ILOs) changed or affirmed and what was the process for doing so? (St. I/Cr. 1, 4)
2. What evidence is there that students are learning the essential outcomes described in our curriculum? What are the processes in place to ensure meaningful and sustainable assessment of student learning across the institution?
    - How effectively are assessment outcomes being shared across entities/offices to improve educational effectiveness? (St. V/Cr. 3)
    - What evidence do we have that students acquire essential skills and synthesis of learning through the curriculum? (St. III/Cr. 1) (St. V/Cr. 1)
    - How do we communicate and review assessment results sustainably? (St. III/Cr. 2c) (St V/ Cr. 3)
  3. How are High-Impact Practices supported and integrated into the student experience?
    - What are the defining curricular/educational characteristics of a Juniata student experience? (St. III/Cr. 1, 5b)
    - How do we determine/measure whether there are sufficient learning opportunities and resources/support for high impact learning? (St. V/Cr. 2c)
    - Who is responsible for assessing the quality and educational effectiveness of high impact practices and communicating those results to internal stakeholders? (St. V/Cr. 2b & c)
  4. What equity gaps exist regarding the student educational experiences and how are they addressed?
    - How do we assess and address issues of equity regarding the student educational experience? (St. II/Cr. 2,7) (St.V/Cr. 3)
  5. How are faculty and other appropriate professionals evaluated, mentored, and supported to ensure that they are sufficient in number and provided with resources to deliver a quality educational experience consistent with our mission and goals?
    - What opportunities, support, and resources are provided to those who design, deliver, and assess the student learning experience for sustainability, growth, and innovation? (St. V/Cr. 2a)
    - How is equity and fairness ensured in the process/procedure of reviewing faculty and other professionals responsible for designing an engaging, personalized teaching and learning experience? (St. III/Cr. 2e)

#### Examples of Potential Evidence

- Academic Catalogue
- Syllabi
- Program/Department Review/Program Prioritization Data
- Institutional Learning Outcomes & General Education Curriculum
- Samples of student portfolios and transcripts

- Data on number of students participating in High Impact Practices
- Personnel Evaluation Committee Guidelines
- Faculty Manual
- Scholarship of Teaching and Learning Work

Working Group #2: Strengthen Student Success & Outcomes for All Students

Primary Standards to Evaluate: Standards II, III, IV

Co-Leaders: Matthew Damschroder, James Tuten

Steering Committee Supporting Member: Reggie Onyido

Designated Evidence Manager: Anne Wood

Consider how Standards II, III, and IV are linked to Juniata's Mission, Strategic Plan, and the specific institutional priority to "Strengthen Student Success & Outcomes for All Students". In looking at the criteria found within these standards, the following lines of inquiry emerged.

1. What processes are leveraged and how successful has the institution been in creating communities that reflect and support student diversity?
  - How does the College employ process and practices that support the presence of underrepresented and under-resourced students from recruitment and matriculation through completion, with attention to transparency and honesty, equity and affordability, and adequate institutional programmatic support? (St. II/Cr. 2, 6, 7) (St. III/Cr. 1, 2a, 2c, 3, 4, 6) (St. IV/Cr. 1, 2, 4, 6) (St. V/Cr. 2)
  - The social protests, awareness and change agency generated from the Summer 2020 killing of George Floyd and others prompted considerable institutional self-examination and the creation of change agendas. What progress has the College made towards equity outcomes, and how have those changes helped align mission and culture. What remains and how will it be accomplished? (St. I/Cr. 3,4) (St. II/Cr. 2) (St. III/Cr. 2e, 4, 5) (St. IV/Cr. 1,6)
  - How do we meet the needs of diverse student learners? (St. II/Cr. 2, 3) (St. III/Cr. 1, 4) (St. IV/Cr. 1, 6)
  - As the College expands its range of degree programs and offerings, how are the experiences and needs of graduate, adult, online/remote and non-traditional student cohorts recognized and addressed? (St. I/Cr. 3) (St. II/Cr. 2) (St. III/Cr. 1, 2, 3, 4, 6) (St. IV/Cr. 1, 2, 6)
  - How has a greater focus impacted our student's ability to meaningfully engage with cultures and individuals different than themselves, and are there opportunities to better leverage such trends in creative ways to better achieve that aim? (St. I/Cr. 3) (St. II/Cr. 2) (St. III/Cr. 4, 5) (St. IV/Cr. 4, 6)

2. What processes are leveraged and how successful has the institution been in designing intentional student experiences that meet institutional learning outcomes?
  - How does the College integrate faculty and administrators to create effective communication flow that helps comprehensively support students? (St. I/Cr. 1f) (St. II/Cr. 6) (St. III/Cr. 2, 3, 6) (St. IV/Cr. 1, 3, 4)
  - How are student success and outcomes reflected in the priorities of the strategic plan under development, and the previous plan, Courage to Act? (St. 1/Cr.1)(St. II/Cr. 8a) (St. III/Cr. 1, 2, 4, 6) (St. IV/ Cr. 1,4)
  - What did the pandemic and its impacts on higher education teach the College about student success and outcomes? What will be sustained or applied learning? What does the College need to adapt or change as a result of pandemic experiences and observations? (St. II/Cr. 1,2) (St. III/Cr. 1, 4, 5, 6) (St. IV/ Cr. 1, 6)(St.V/Cr. 2,3)
  - What efforts are being made to link mission, planning and resource allocation? (St.1/Cr.1)(St. III/Cr. 2, 4) (St. IV/ Cr. 1, 4)
  - What strategies have been effective in the College's evolving recruitment and retention practices? What trends need to be further considered and addressed, and what is the plan for doing so? (St. II/Cr. 6) (St. III/Cr. 2, 3, 6) (St. IV/ Cr. 1, 2)(St. V/Cr. 3)
  - How do campus capital resources, physical spaces and technology systems (academic and non-academic) meet the needs of students? (St. III/Cr. 1, 4) (St. IV/ Cr. 3, 6)
  - Exemplary educational practices that reflect student success and outcomes are reflected in cohered learning experiences that link classroom learning and co-curricular engagement. What programs or experiences does the College provide to educate across domains of interaction? (St. II/Cr. 1,2,8a) (St. III/Cr. 1, 4, 5, 6) (St. IV/ Cr. 1)
  - How are college personnel adequately prepared and resourced to design and deliver the experiences and outcomes incumbent in the mission and realized through curricular and co-curricular experiences? (St. III/Cr. 2, 4, 5, 6) (St. IV/ Cr. 3, 6)
3. How has the College made critical changes to enhance educational environments?
  - Why and through what process was the mission statement developed, and to what extent is this mission infused in the goals, assessments and outcomes of different campus organizational structures? (St.I/Cr. 4)(St. III/Cr. 2e, 4, 7, 8)
  - How does the College demonstrate its commitment to integrity, diversity, intellectual life and a student-centered philosophy? (St. II/Cr. 1, 2) (St. III/Cr. 1, 2, 4, 5, 6) (St. IV/ Cr. 1, 3, 6)
  - How does the college utilize results from assessment instruments to meaningfully enact positive change in our ability to offer students a unique and supportive learning environment? (St. II/Cr. 8a) (St. III/Cr. 1, 2e, 4, 7, 8) (St. IV/ Cr. 1, 6)(St. V/Cr. 3)

- How is the College adapting emerging pedagogies and practices of teaching and learning, and providing adequate and suitable support to assist students in overcoming obstacles and meeting completion goals? (St. II/Cr. 1, 2, 6, 8) (St. III/Cr. 1, 3, 4, 5, 6, 8) (St. IV/ Cr. 1, 6)(St. V/Cr. 2)
- Why, when, how does the institution provide structures for change to the academic enterprise? (St. II/Cr. 3, 4, 5) (St. III/Cr. 7,8)

#### Examples of Potential Evidence

- Community Based Organizations (CBO) Partnerships, development of EDI-related positions
- Summer Advisory Committee, Establishment of EDI Council, Embedding EDI responsibilities within positions, Dean of EDI position, BRT reboot, disaggregated consideration of student outcomes, curricular/pedagogical equity adjustments.
- Study abroad, short-term and faculty led study abroad, exchange programs, EDI offerings, speakers/lectures, curricula/SOTL, diversification of enrollment.
- Community Engaged Learning/Internships, Local Engagement Requirement, Mentored Research
- IPEDs – Graduation rates by diversity cohorts – compared to peers
- Diversity participating in Study Abroad and other educational opportunities
- Outcomes data; career, grad school

#### Working Group #3: Ensure the Long-term Viability: Planning, Assessment, & Alignment of Resources

Primary Standards to Evaluate: Standards I, VI, VII

Co-Leaders: Kathryn Blake, Matt Powell

Steering Committee Supporting Member: Tracy Grajewski

Designated Evidence Manager: Bethany Sheffield

Consider how Standards I, VI, and VII are linked to Juniata’s Mission, Strategic Plan, and the specific institutional priority to “Ensure the Long-term Viability of Juniata in our Planning, Assessment, & Alignment of Resources efforts”. In looking at the criteria found within these standards, the following lines of inquiry emerged.

1. In what ways does the organizational structure/chart reflect and communicate Juniata’s mission and goals across the organization, with particular emphasis on student learning?
  - How is that structure communicated (e.g., what documents exist to make constituents aware of responsibilities, roles, accountability)? (St. I/Cr. 1g)
  - How is this structure evaluated and what is the timeline? (St. VI/Cr. 2)

- How has the organizational structure changed to meet College needs, what were the results of those changes, and what are existing structural barriers we still need to overcome? (St. II/Cr. 5) (St. VI/ Cr. 3)
  - How does the College ensure that talent is recruited in an equitable manner that promotes diversity, is effectively matched to the evolving needs of the College (is the right person in the right job), and that skills remain current (professional development)? (St. II/Cr. 5)(St. VI, Cr. 4)
  - What tasks are assigned to administration and how are they distributed and supported? (St. VII/Cr. 1, 4)
  - What tasks are assigned to faculty and how are they distributed and supported? (St. VII/Cr. 1, 4)
  - What opportunities do students have to provide input to the development and execution of strategic initiatives? (St. VII/Cr. 1)
  - Does the performance management process reflect cascading accountabilities that start at strategy level and carry through to individual goals and expectations? (St. VI/Cr. 5) (St. VII/Cr. 5)
2. How is research and resulting data aligned with and driven by questions we need to answer for institutional improvement and what is our capacity for doing so?
- How does the institution set and communicate goals, assess, and reflect and act on results? What kind of data and feedback is collected and how is it used? (St. VI/Cr. 1, 2)
  - What processes are in place to ensure data is collected and used? (St. VI/Cr. 8)
  - Do the questions we ask seek to uncover and repair inequities in how our mission is accomplished? (St. II/Cr. 1, 2)
  - What changes have been made as a result of assessing institutional goals? (St. 1/Cr. 4)(St. VI/Cr. 2) (St. V/Cr. 3)
  - How are these changes documented and disseminated? (How do we “close the loop” after generating information?) (St. VI/Cr. 1, 2)
  - What internal and external review processes exist to validate the institutional adherence to operating guidelines and conditions? (St. VI/Cr. 7)
  - What are the institutional benchmarks for the effectiveness of governance, leadership, and administration, and how are they chosen and evaluated? (St. VII/Cr. 5)
  - What is the balance between formative vs. summative data generation (have we struck the right balance between time spent on reporting requirements vs. more impactful assessment)? (St. VI/Cr. 2,9)
3. By what process do we choose how to invest in human and physical infrastructure needs to meet our institutional goals, and what has been the outcome of recent investments? How effective is this process?



- What is the impact of unmet infrastructure (human, financial, technological, physical) needs on the ability to meet institutional goals, with particular focus on student learning and equitable delivery of a Juniata education? (St I/Cr. 3)(St. VI/Cr. 4, 6)(St. V/Cr. 3, 5)
  - To what degree does infrastructure relieve people of lower-order processing to apply themselves to higher-order activities in service of institutional goals? (St. VII, Cr. 4)
4. How does governance and organizational communication ensure the successful implementation of goals, the fulfillment of key initiatives, and allocation of resources?
- What channels exist and are used for bi-directional internal and external communication? (St. 1/Cr 1)(St. VII/Cr. 1)
  - Do all members of the Juniata community have equal access to organizational communication and shared decision-making? (St. 2 & 3)
5. How effectively are our financial resources aligned with institutional priorities, and what is the process by which that alignment happens?
- How are budgets developed, synthesized, and communicated across the organization? (St. VI/Cr. 3)
  - What are the benchmarks for decision-making about allocation of resources? (St. VI/Cr. 5)
  - What stakeholders participate in discussions about allocation of resources, and by what processes are the interests of stakeholders that do not participate adequately represented? (St. VII/Cr. 1)

#### Examples of Potential Evidence

- Performance management documentation and its alignment with the “Courage to Act” strategic plan
- Administrative program review process/Departments & Programs Committee
- Scorecard/President’s annual performance review with the Executive Committee of the Board (related to benchmarks for the institution)
- Organization Chart
- Job descriptions for positions (<https://www.juniata.edu/offices/human-resources/current-employees/job-descriptions/>), Faculty Handbook
- Budget process from CFO, Senior Leadership Team (where decisions about priorities are made and reviewed)
- Board of Trustees by-laws and committee charters
- President’s town hall recordings, presentation files
- Campus master plan, other Facilities planning documents, Advancement’s priorities
- IT Governance

#### Working Group #4: Ensure the Long-term Viability: Sustaining and Diversifying Revenue

Primary Standards to Evaluate: Standards VI, VII

Co-Leaders: Steven Simons, Wei-Chung Wang

Steering Committee Supporting Member: Karla Wiser

Designated Evidence Manager: Sally Oberle

Consider how Standards VI and VII are linked to Juniata's Mission, Strategic Plan, and the specific institutional priority to "Ensure the Long-term Viability of Juniata by Sustaining and Diversifying Revenue". In looking at the criteria found within these standards, the following lines of inquiry emerged.

1. What is the institution's capacity for creating new revenue streams and enhance existing ones?
  - What are the processes / steps to attract non-traditional students? (St. VI/ Cr. 1)
  - How are we enhancing our offerings to appeal to both traditional and non-traditional students? (new POEs, certificates, camps, ESL) (St. VI/ Cr. 3)
  - What are the programming opportunities being pursued that fall outside curricular or co-curricular sources? (St. VI/ Cr. 4,6)
  - What are the processes / steps being taken by Advancement to solicit financial support to improve the revenue position? (St. VI/ Cr. 8)
  - What are the revenue streams being pursued that fall outside curricular or co-curricular sources? (Auxiliary enterprises, grants) (St. VI/ Cr. 6,8,9)
  - What are the processes to establish and market graduate programs? What is the revenue forecast? (St. VI/ Cr. 9)
  - What steps has the institution taken to recruit graduate students from other countries? (St. VI/ Cr. 4)
2. What efforts have been made to sustain a consistent enrollment of traditional full-time undergraduate students, which make up the corps of our revenue?
  - How is the institution improving access for students with high financial need? (St. I/Cr. 3)(St. II/Cr. 6,7)(St. IV/Cr. 1)(St. VI / Cr. 8)
  - What efforts are underway to address the decline of high school graduates in our traditional market? (St. VI / Cr. 3,4,6,7,9)(St. VII/Cr. 1, 2, 3, 4, 5)
  - What plans does the institution have to combat increasing discount rates and price-sensitivity in the market? (St. VI / Cr. 3,4,6,7,9)(St. VII/Cr. 1, 2, 3, 4, 5)
  - What steps has the institution taken to enhance its reputation and brand awareness among traditional and emerging markets? (St. VI / Cr. 1,2,3,4)(St. VII/Cr. 4)
  - What effort has the institution made to market and recruit outside of the geographic regions where the institution used to get most of its students from? (St. VI/ Cr. 2, 3)(St. VII/Cr. 4)

3. What is the institution's current financial strategy to maintain or improve our credit profile?
  - How does the budget process allocate budgets in accordance with the strategic plan? (St. VI/Cr. 3)
  - How does the institution determine capital planning and deferred maintenance resources? (St. VI/Cr. 6)
  - How have revenue diversification initiatives (I.e., grad programs, conferences & events, etc.) performed as planned and are contributing to the budget as expected? (St. VI/Cr. 9)
4. What efforts are underway to evaluate the long-term viability of our current business model?
  - What significant changes need to be made to our business model to ensure long-term viability? (St. VII/Cr. 2) (St. VI/Cr. 3,6,8,9)
  - What initiatives has the governing board taken to explore opportunities that would enhance the financial stability of the institution? (St. VII/Cr. 2)
5. Which structures / processes exist to sustain or enhance revenue directly related to the retention of students already enrolled?
  - What student support services does the institution provide? (St. VI, Cr. 4, 8) (St. VII/Cr. 4)
  - Do we offer adequate student services to sustain / enhance our retention efforts? (St. IV, Cr. 1) (St. VI/Cr. 9)
  - How do we plan to improve our retention of students of disadvantaged groups? (St. VI, Cr. 4, 8) (St. VII/Cr. 4)
6. What is the impact of the COVID-19 pandemic on the COVID mitigation effort on the viability of the institution?
  - How might the institutional response to the pandemic provide future opportunities in support of revenue generation? (St. VI/ Cr. 4, 8) (St. VII/Cr. 4)
  - Were we able to offer an educational experience in the midst of the pandemic that generated adequate revenue while maintaining educational quality? (St. VI/Cr. 9)

#### Examples of Potential Evidence

- Program development – academic programs (undergrad and grad), co-curricular experiences (sports, mock trial, e-sports), auxiliary enterprise (Parkhurst), conferences/events, rental income
- Enrollment / CBO initiatives. Pricing Task-Force. Brand / Marketing work
- Financial Statements, Management Letters, S&P credit rating profile, DOE composite score, compliance reports (bond covenants)
- PIVOT work
- Student Services / Academic Support / EDI

- Sustained in-person instruction, hybrid flexible teaching model, IEI Grant
- Advancement Goals and Campaign/Giving Reports