



Grinnell College 2017–18 Strategic Action Plan

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Grinnell's Strategic Planning: A Continuous Planning Model

Note from Vice President for Strategic Planning

Grinnell College completed its fifth year of implementation of continuous strategic planning.

Each year, a new action plan is developed by the co-leads of strategic planning, the Dean of the College, the Vice President for Strategic Planning, and the President. The main section of the report consists of the 2017–18 action plans for each of the strategic areas and the reports from the 2016–17 crosscutting theme task forces: The Task Force on Residential Learning (second year) and the Student Mental Health Task Force (first year).

Continuous strategic planning integrates strategic work into the fabric of the organization. It is not a stand-alone effort. No one person or office owns the responsibility. This shared leadership has resulted in exceptional work and has motivated many individuals and groups from all quarters to contribute their efforts. The co-leads for each strategy have moved forward with enthusiasm, energy, and imagination. They have encouraged and accomplished an enormous amount of work. Again, it is with humility and gratitude that I offer this compilation of the fine work of my colleagues and the plans for 2017–18.

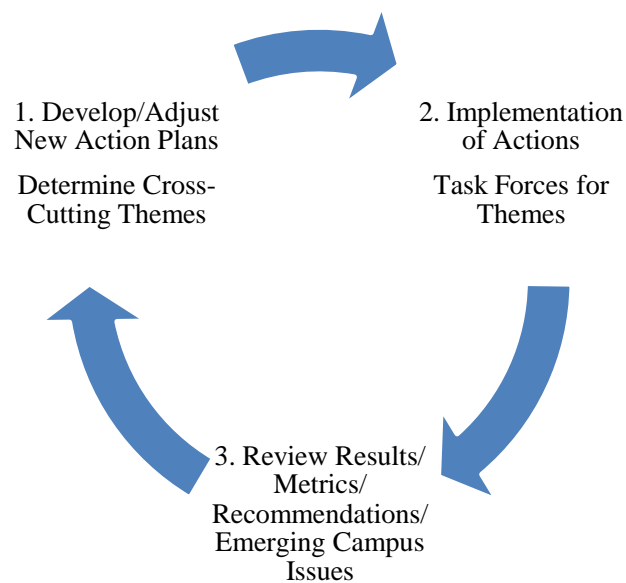
Angela Voos, Vice President for Strategic Planning

Background: A Traditional Strategic Plan vs. Continuous Strategic Planning

Any planning process takes place in a dynamic environment: Actions that seemed logical at the outset may no longer seem appropriate one or two years into the work. Conditions may change, resources may shift, new opportunities or challenges may emerge ... Our solution is to set the goals but allow flexibility in our tactics. Grinnell's best chance of reaching its goals is by a process of continuous review and reassessment. — Grinnell planning philosophy as written in the 2013 Action Plan (first year of implementation).

Grinnell's plan differs from the traditional model in that our model involves multiple leaders. The Dean of the College and the Vice President for Strategic Planning co-chair each year. This partnership of the Dean and Vice President encourages planning that is informed by and serves the core mission of Grinnell: teaching and learning. The Strategic Planning Committee is made up of teams of senior staff paired with faculty members directing each strategy. Placing each strategy squarely in an administrative area assures that there is a point person responsible for the accomplishment and review of that strategy. Pairing the senior staff member with faculty members supports strategic decisions informed by faculty as well as an administrative perspective. Finally, the distributed leadership model (consisting of 12-15 co-leads) encourages cross-disciplinary work among strategic areas.

Grinnell's approach also differs from the traditional model of one strategic plan that determines actions for the next five years. Grinnell's strategic plan is a set of reports, metrics, and annual action plans. Each year, as we implement this continuous planning model, tasks are



adjusted, added, and removed from the Action Plan based on the results from the previous year, new information and research about Grinnell, and emerging issues in higher education.



The Iterative Nature of Continuous Strategic Planning

Continuous planning is iterative in nature. On an annual basis, co-leads for each strategy may change, tactics are reviewed and modified, new crosscutting themes are discussed, and measures toward progress are taken. At some point in the future, the Board of Trustees and campus will review the major directions to decide if these should remain the foci of strategic work. Further down the road, the board and administration will decide to review the vision of the College.

Though the six major directions guide the majority of work for strategic planning, all-campus conversations on crosscutting themes are an additional element of the continuous planning model. The all-campus conversations provide new dimensions to Grinnell's evolving plans. The themes emerge from discussions on campus and nationally significant topics. Each year, the president designates themes and appoints task forces. Each task force is charged with defining the issue and making recommendations for next actions. For the first three years, the all-campus conversations were yearlong projects. This year, we are expanding this work to two years instead of one. Our early experience with crosscutting themes suggests that effectively addressing the crosscutting themes requires a second year for initial implementation.

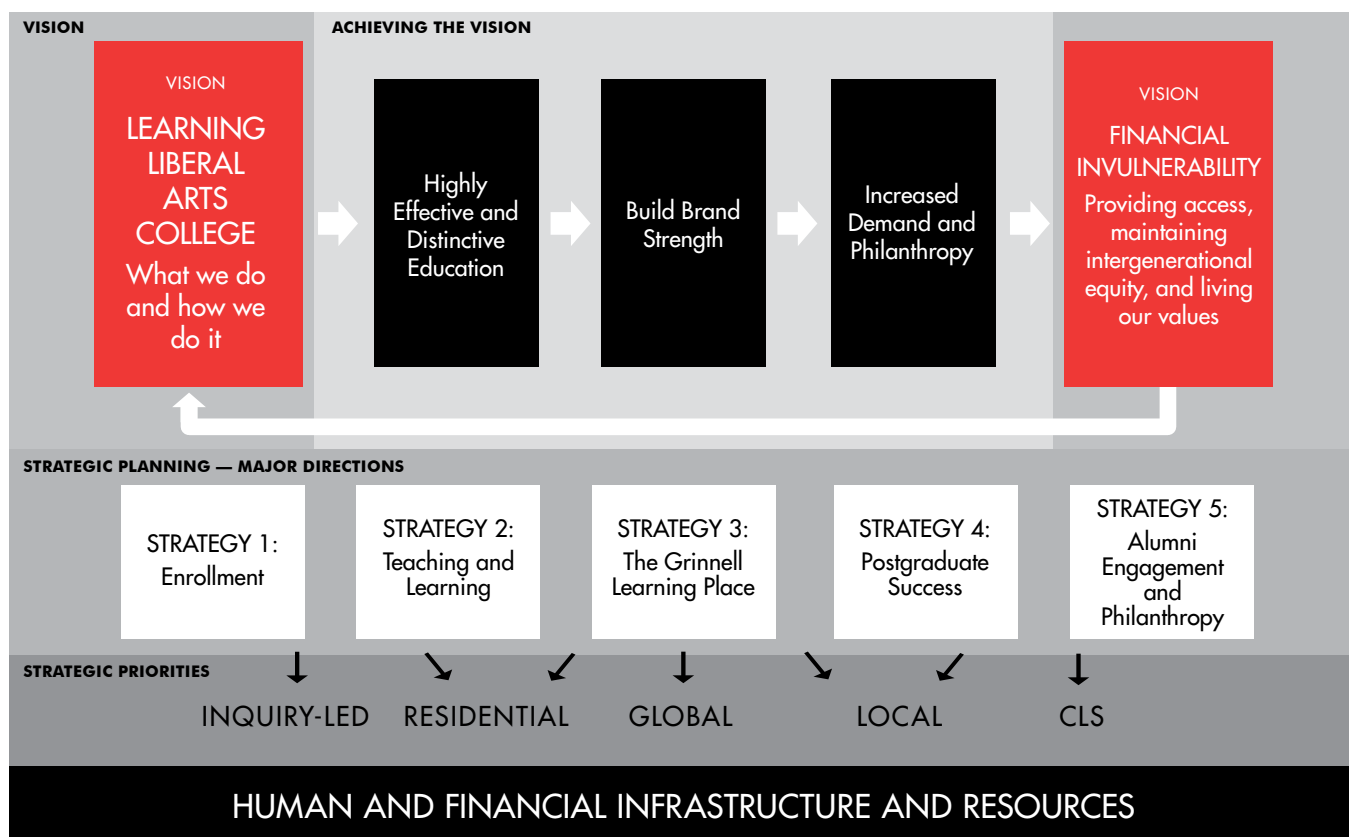
A Recap of the Six Major Directions

The launch of Grinnell's strategic planning (2011) began with five major directions and added Managing Human and Financial Resources as an underpinning sixth direction. The schematic below is the most recent iteration of the major directions of Grinnell's strategic planning. The new organization groups together the major directions that relate to the student experience during college: Teaching and Learning, The Grinnell Place, and Postgraduate Success. The inclusion of Postgraduate Success in the group underscores the goal of helping students connect their learning experience in college directly to their future after college. The major direction of Enrollment is placed at the beginning of the schematic

to represent a student’s pre-Grinnell experience, and Alumni Engagement is at the end to represent a student’s post-college experience.

Continuous strategic planning is a process of ever-sharpening the institution’s focus. The regrouping below includes focus areas that reflect programmatic priorities in the coming years: inquiry-led learning, residential learning, global Grinnell, local Grinnell, and postgraduate success. These priorities reflect the heart of Grinnell’s mission: preparation of students for meaningful and successful lives. These priorities will be the emphases of fundraising efforts in a future comprehensive campaign.

STRATEGIC PRIORITIES FRAMEWORK



Strategy 1: Enrollment — Attract, enrich, and graduate a diverse and talented student body. Co-leads: Justin Thomas, associate professor of theatre and dance; Joseph Bagnoli, vice president for enrollment and dean of admission and financial aid.

Strategy 2: Teaching and Learning — Re-envision Grinnell’s commitment to a liberal education and its value in the 21st century. Co-leads: Michael Latham, vice president for academic affairs and dean of the College; Henry Rietz, professor of religious studies and chair of the faculty.

Future Campaign Focus: Inquiry-Led Learning, Residential Learning, Global Grinnell

Strategy 3: The Grinnell Learning Place — Build learning spaces that encourage collaboration, creativity, and inquiry. Co-leads: James Swartz, Dack Professor of Chemistry; Keith Brouhle, associate professor of economics; Erik Simpson, professor of English; Kate Walker, vice president for finance and treasurer of the College; Rick Whitney, assistant vice president of facilities management.

Future Campaign Focus: Humanities and Social Studies Complex, Landscaping, Admissions Center, Zone of Confluence (Local Grinnell)

Strategy 4: Postgraduate Success — Instill an orientation to the future and intentionally connect the Grinnell educational experience to postgraduate endeavors. Co-leads: Monessa Cummins, associate professor of classics; Mark Peltz, Daniel and Patricia Jipp Finkelman Dean, Center for Careers, Life, and Service.

Future Campaign Focus: Postgraduate Success

Strategy 5: Alumni Engagement and Philanthropy — Foster lifelong learning and contributions of alumni in the College’s intellectual life, service, mentorship, and advising. Co-leads: Sarah Purcell, L.F. Parker Professor of History; Jayn Chaney, director of alumni and donor relations; Adam Laug, director of development.

Strategy 6: The Management of Grinnell’s Infrastructure Resources — Transform administrative practices to maintain continuous, collaborative, and adaptive planning for the College. Co-leads: Kate Walker, vice president for finance and treasurer of the College; Carlie VanWilligen, director of institutional research.

All-Campus Conversations on Crosscutting Themes

	Planning Year FY12	FY13	FY14	FY15	FY16	FY17
Theme	Strategic Planning	Financial Aid and Need-Blind Policy	Diversity	Global Grinnell	Residential Learning	Student Mental Health
Theme	Financial Model	Title IX and Wellness	Technology in Learning	Disability and Accessibility	Implementation of FY14 Themes	Implementation of FY15 Themes

Measuring Progress

As part of Grinnell’s continuous planning model, the measures of progress/success start at the Board level. In 2014–15, the Audit and Assessment Committee of the Board of Trustees suggested a change in the organization of the core metrics. Instead of dividing the metrics between mission metrics and financial sustainability metrics, the new iteration of core

metrics regroups the measures into major issues. The new organization is presented to the Board in an interactive format that allows board members to look at the underlying data and definitions for the trend and comparative graphs. The table of contents for the Core Metrics section of the board website appears below. In 2015–16, the actionable risks in the Enterprise Risk section of the core metrics was re-envisioned as a heat map.

Grinnell College: Core Metrics October 2016

- 1. Performance in the Market for Students**
 - a. Key admission statistics
 - b. Ratings/perceptions by external agencies

- 2. Diversity of the College Community**
 - a. Diversity of the student body
 - b. Diversity of the faculty and staff

- 3. Learning and Teaching Success**
 - a. National Survey of Student Engagement (NSSE)
 - b. Completion rates

- 4. Institutional Outcomes**
 - a. Status and assessment strategy

- 5. Careers, Life, and Service for Graduates**
 - a. First Destination Survey data
 - b. Alumni Survey data

- 6. Financial Sustainability**
 - a. Revenue balance and cost control
 - b. The endowment, reserves, and debt
 - c. Donors, commitments, and receipts

- 7. Enterprise Risk Management**
 - a. Heat Map

2017–18 Action Plans

Strategy 1: Enrollment

Staff Lead: Joe Bagnoli, vice president for enrollment and dean of admission and financial aid

Faculty Lead: Justin Thomas, associate professor of theatre and dance

Goal: Attract, enrich, and graduate a diverse and talented student community. Create a student body that individually and collectively reaches a remarkable record of achievement and that maximizes the interactive learning opportunities for all Grinnell students.

Objectives

- Develop financially sustainable admission and financial-aid policies consistent with a mission of academic excellence and educational access.
- Develop *Guiding Principles for the Composition of the Student Body*.
- Maintain the academic profile of the incoming classes of students.
- Focus financial aid to provide access to a Grinnell education for academically qualified students with significant financial need or backgrounds that would create an obstacle to earning a college degree.
- Increase the diversity of the student body to provide a robust learning environment.
- Understand and positively influence market perceptions of prospective students and their families.
- Enroll entering classes of students who are strongly matched to Grinnell and therefore are likely to succeed and graduate.
- Retain and graduate students who choose to pursue an education at Grinnell.
- Maintain prospective and continuing student demand for a Grinnell education.
- Enroll a highly qualified cohort of first New Orleans Posse. (Completed)

2016–17 Progress

1. Identify an external partner who can assist with brand development, website development, video promotions, a more aggressive admission communication plan, and a comprehensive digital strategy. (Completed)
2. Finalize the design of a new admission and financial aid office. (Completed)
3. Increase the number of students who choose to visit campus.
4. Incorporate the emerging institutional identity into our campus-visit narrative in creative and compelling ways. (Ongoing)
5. Maintain our enrollment of new African American and Hispanic students, reaching our racial diversity targets without the assistance of the Posse Foundation. (Successful for class of 2021)
6. Examine additional possibilities for increasing student revenue (e.g., need-aware on the wait list, increasing revenue through international student enrollment, midyear admission cohort, etc.). (Ongoing)
7. Rebuild the admission team following the departure of seven employees in 2016. (Successful)

Grinnell has maintained diversity in entering classes, improved the academic profile of entering students, and increased associated net tuition revenue by 27 percent. Our entering class of new and transfer students numbered 450 (our target was a range of 450–460), and they can be characterized as follows:

- The highest average SAT test score — 1438 — in history, in part explained by a modification to scoring changes introduced by the College Board
- The highest representation of underrepresented domestic students of color in the last four years (in the first year after separating from the Posse Foundation)
- A strong, diverse class of international students in which students from China represented less than 30 percent of all international students
- The highest level of net student revenue in history (\$9.6 million compared to the prior high watermark in 2015 of \$8.9 million)

2017–18 Actions

- Segment: Develop specific processes and plans for segmented markets.
 - Launch a Preliminary Application to help us gauge a student’s interest earlier in the admission cycle.
 - Implement collection of self-reported student credentials to help identify strong prospects earlier.
 - Aggregate data inform a “major markets” process to focus outreach efforts.
 - Implement new record-keeping functions for internal programs like the Grinnell Diversity Travel Opportunity Program as well as partner organizations such as

- QuestBridge.
 - Collect information from more sources regarding student academic interests.
- Professionalize: Deepen professional capacities and broaden staff skill sets.
 - Provide staff training for using Slate’s bulk email delivery tool.
 - Hold a series of brown-bag lunch seminars to teach staff members how to perform mail merges, use spreadsheet auto-filters and formulas, and utilize excel pivot Table features.
 - Create a rules-driven approach for ACT and SAT scores.
- Personalize: Leverage individual attention in the recruitment process.
 - Craft a geo-proximity process to invite students to off-campus interview opportunities.
 - Blend QuestBridge source data to connect with conference attendees.
 - Plan for off-campus financial aid workshops (event registration and data).
- Analyze: Move toward a more data-informed mode of operation.
 - Draw on more variables to improve the predictive enrollment models.
 - Research the intended majors of prospective students.
 - Provide Ologie list data to conduct brand positioning surveys.
 - Create new query bases (data references) that were not accessible previously.
 - Create Voyager maps in Slate to help counselors conceptualize their marketspaces.
 - Build a better set of management reporting tools, create/fix origin-source data, and build counselor-specific prospect tracking reports.
 - Develop a more robust predictive model to evaluate prospect’s likelihood to apply.
- Relate: Enhance connections across multiple constituencies, internally and externally.
 - Create an internal operations calendar tool to coordinate projects across the office.
 - Build new data views for loading data into Colleague and ODS.
 - Build new extraction data sets for use by enrollment consultants, rebuild reader forms by population (and potentially the rating system, overall), rebuild the athletics portal, and deploy a new, sustainable alumni data portal tool.
- Communicate: Make communication methods and channels more varied, efficient, and sophisticated.

- Launch a new series of junior emails through a drip campaign.
- Create an electronic campaign to promote completion of a new preliminary application.
- Upgrade the application status page for prospective students.
- Commit to a production schedule for the communication flow.

Strategy 2: Teaching and Learning

Staff Lead: Michael Latham, vice president for academic affairs and dean of the College

Faculty Lead: Henry Rietz, professor of religious studies, chair of the faculty

Goal: Re-envision Grinnell’s commitment to a liberal education and its value in the 21st century. Create an innovative and evolving student-centered, liberal arts curriculum (academic experience) that enables students to be successful in an ever-changing world and informs and enriches the lives of Grinnell graduates.

Objectives:

- Create an adaptive curriculum and pedagogy that will evolve fluidly, creatively, and intentionally in response to new and sometimes unanticipated challenges.
- Cultivate students who can integrate knowledge across disciplines; who are sophisticated in their writing, analysis, and research; and who understand the social basis and responsibilities of knowledge.
- Create a flexible environment that allows for creativity and collaboration across disciplines.
- Increase the accessibility and sharing of knowledge, scholarship, and primary source materials created at or owned by the College.

2016–17 Progress

During 2016–17, Academic Affairs promoted two major sets of goals:

1. We advanced innovative teaching and learning, particularly student and faculty research, global education, interdisciplinary initiatives, and the digital liberal arts.
2. We improved the College’s overall academic infrastructure, both in terms of governance and resources to enable Grinnell to deliver a transformative liberal arts education.

Advance Innovative, Inquiry-Led Teaching and Learning

1. Student and Faculty Research

- a. VPAA/Dean Latham and Associate Dean Maria Tapias supported Grinnell's 26 academic departments as planned to incorporate student research directly into the curriculum while maintaining options for Mentored Advanced Projects (MAPs) and independent study.
- b. A new faculty sabbatical model was fully implemented, replacing MAP course releases and making Grinnell far more competitive in terms of faculty research support. We worked with Kate Walker to manage faculty salary budget and term hiring to allow project to go forward.
- c. Associate Dean Karla Erickson collaborated with the grants office to implement a highly successful program to support professional development for midcareer faculty, including the definition of research goals.
- d. Associate Dean Shanna Benjamin collaborated with faculty and staff to expand the Student Research Symposium from 70 to more than 115 student participants across the academic disciplines.
- e. Norm Braaten was hired as the new research compliance manager, and the grants office started preparing a grants handbook.
- f. Susan Ferrari and Laura Nelson-Lof in the grants office strongly promoted faculty pursuit of external awards, leading to 21 successful grants totaling nearly \$2.3 million.

2. International Initiatives and Planning

- a. The new Institute for Global Education was launched, including a symposium on human migration and nationalism, creation of a Language Learning Center, and continuation of highly successful Global Learning Program tutorials.
- b. The institute went through successful transitioning, with Professor Shuchi Kapila becoming assistant vice president and senior international officer, replacing David Cook-Martín. IGE hired Kate Patch as new senior director of global initiatives and Alicia Stanley as director of off-campus study.
- c. A new IGE Advisory Board was planned and fully staffed to include faculty, student, and alumni/trustee members.
- d. The MOU with Nanjing University was revised, incorporating new elements related to pedagogy workshops and summer research exchanges, commemorating Grinnell's 30-year partnership.
- e. We initiated plans with Leiden University College for a partnership to potentially include student and faculty exchanges, OCS, and research opportunities.

3. Teaching and Learning Across Disciplines

- a. Faculty task force led by Professor Tyler Roberts completed its work, proposing a model for interdisciplinary course clusters. The first pilot will begin in spring 2018.

- b. Faculty team further advanced curricular planning and new courses in data science, drawing on a grant from the Carver Trust. Planning discussions started with faculty regarding media studies, an international curricular focus, and critical race studies.

4. Digital Liberal Arts

- a. Continued to advance innovative pedagogy through the Mellon Foundation-University of Iowa Digital Bridges Grant, the Library, and the Digital Liberal Arts Collaborative in the Center for Teaching, Learning, and Assessment (CTLA).

Improve Infrastructure for Transformative Liberal Arts Education

1. Diversity and Inclusion

- a. Chief Diversity Officer Lakesia Johnson implemented Equity Advocates Program to advance goals for equity and diversity in faculty searches and conducted trainings across campus on issues of implicit bias.
- b. Administrative structure was stabilized to support diversity work. Andrea Conner, associate vice president for student affairs, hired Maure Smith-Benanti as new assistant dean for intercultural affairs.
- c. The Peer Connections Pre-Orientation Program (PCPOP) expanded to a yearlong model of support for incoming students.
- d. A campus climate survey was conducted as part of overall diversity planning.

2. Shared Governance

- a. VPAA/Dean Latham joined Chair of the Faculty Henry Reitz to hold several discussions with faculty to evaluate current state of shared governance and means to improve it. Consulted with previous chairs of the faculty and deans of the College and raised policy questions with Executive Council.

3. Residential Learning and Academic Mission

- a. Associate VP for Student Affairs Andrea Conner and Professor Paul Hutchison further advanced the work of Task Force on Residential Learning. Areas of focus included integrating academic mission into residential setting, improving the quality of student life (promoting wellness and managing alcohol and substance abuse), student leadership programming, and concepts of self-governance.
- b. Student Affairs hired James Shropshire as new Director of Campus Safety.

4. Student Success and HLC Accreditation

- a. Associate Dean Karla Erickson led drafting of required HLC assurance argument and worked with the institutional research office to build required evidence file in preparation for fall 2018 accreditation visit.
- b. Assessment Committee and CTLA promoted further department-level assessment

work.

- c. Regular meetings of institutional research and student affairs staff were convened to improve student support practices and data collection.

5. Student Mental Health

- a. A task force was launched to assess and make recommendations regarding evidence-based mental illness prevention models, review current resources in light of best practices, and conduct research to improve services and understand mental health needs at small colleges.
- b. Institutional Research and CTLA hosted mental health/wellness conference, attended by multiple liberal arts colleges.

6. Size of the College

- a. VPAA/Dean Latham collaborated with working group to develop an analytical model for reviewing questions related to the optimum size of the college.
- b. Defined questions related to mission and cost, trade-offs, and step functions and made presentation to the board with CFO Kate Walker.

2017–18 Actions

Advance Innovative, Inquiry-Led Teaching and Learning

- Student and Faculty Research
 - Achieve full implementation of departmental plans to provide all students with the opportunity for significant research experience across the College's curriculum. This will include the expansion of methods courses and research seminars as needed to develop research abilities.
 - Further promote faculty grant-seeking and plan for major institutional grant proposals as well.

- International Initiatives and Planning
 - Work with the IGE Advisory Board and a new director to improve our off-campus study to achieve greater integration with the curriculum, better faculty advising, higher rates of student participation, and improved cost control. Complete a planning process for Grinnell-in-London and Grinnell-in-Washington involving the faculty as well as the Board by the close of the academic year.
 - Implement new elements of the partnership with Nanjing University and define an MOU with Leiden University College. Explore potential partnerships with other liberal arts colleges abroad, exploring opportunities in Latin America or Africa to

- complement those being developed in East Asia and Western Europe.
- Implement new Language Learning Center.

- Teaching and Learning Across Disciplines

- Define strategies to respond to enrollment shifts across the College. Convene faculty-led process to discuss options to promote under-enrolled disciplines and determine how best to support those that have struggled with rapid growth.
- Implement pilot program for course clusters and define timelines for proposals in new interdisciplinary, curricular areas.

- Digital Liberal Arts

- Promote continued collaboration between the Library and CTLA to promote innovation in the digital liberal arts.
- Plan for faculty moves into the Humanities and Social Studies Complex (HSSC) to increase the capacity of our facilities for digital liberal arts enriched and interdisciplinary teaching.

Improve Infrastructure for Transformative Liberal Arts Education

- Diversity and Inclusion

- Complete comprehensive plan for diversity, equity, and inclusion, with substantial engagement across campus by faculty, staff, and students.
- Substantially advance faculty training regarding inclusive teaching and advising.

- Shared Governance

- Collaborate with the chair of the faculty and the Faculty Organization Committee (FOC) to define essential procedures and operational guidelines/flowcharts for decisions involving shared governance. Secure FOC and Executive Council endorsement and bring forward to faculty as means to gain agreement on process and build trust.
- Expand opportunities for faculty to learn more about areas of the College that remain less familiar.

- Residential Learning and Academic Mission

- Bring work of the Residential Learning Task Force to conclusion. Define process for discussion of recommendations across multiple constituencies on campus.
 - Pilot new first-year experience course and decide on future format.
- Student Success and Higher Learning Commission (HLC) Accreditation
 - Ensure that best practices for student advising and the assessment of the tutorial course are fully defined for HLC review.
 - Support board leadership in planning for their role in accreditation.
 - Begin wider campus discussions of the assurance argument in the spring of 2018 in preparation for fall 2018 HLC visit.
 - Student Mental Health
 - Move forward with analysis of Grinnell's practices and resources in meeting student mental health needs. Determine what successful practices from other institutions may be adopted here. Deliver recommendations by the close of the year.
 - Size of the College
 - Advance this analytical project by framing issue of overall goals for any potential change in enrollment and working from there to the trade-offs and costs. Determine process for further discussion with board, faculty, and other constituencies.

Strategy 3: The Grinnell Learning Place

Staff Lead: Kate Walker, vice president for finance and treasurer; Rick Whitney, assistant vice president of facilities management

Faculty Leads: Keith Brouhle, associate professor of economics; James Swartz, professor of chemistry, Dack Professor of Chemistry; Erik Simpson, professor of English

Goal: Build learning spaces that encourage collaboration, creativity, and inquiry. Design, operate, and support all spaces on the campus to enhance the academic, social, and environmental success of the Grinnell College community.

Objectives

- Create learning spaces that promote collaboration, creativity, and inquiry.
- Design spaces to enable faculty to show films, do in-class work on statistics packages, or use databases of images and sounds, and allow students to create different forms of work products.
- Design mission-driven architecture that supports the full creative range of original materials and scholarship products generated at Grinnell.
- Incorporate the city of Grinnell as a place of learning for students, and ensure a continuing collaborative relationship between the College and the city.

2016–17 Progress

Phase I building projects

1. Phase I Financing

- a. January 2017: Completed a very successful \$120 million bond sale, securing a very favorable 30-year fixed rate.
- b. December 2016: Completed credit reviews resulting in continued AAA ratings from both Moody's and S&P.

2. Humanities and Social Studies Complex (HSSC):

- a. Project is on schedule and within budget.
- b. Spring 2017: Created new geothermal field to serve both the HSSC and the AFA.
- c. January 2017: Began construction of HSSC north pavilion, south pavilion, and central atrium.
- d. October 2016: Board approved construction guaranteed maximum price (GMP).
- e. September 2016: Created effective swing space for displaced SFS and emeriti faculty through the purchase of 821 Fifth Ave. in the zone of confluence.
- f. Summer 2016: Renovated two campus facilities to create swing space homes for displaced academic departments (Harry Hopkins House and Faculty House).
- g. Summer 2016: Completed essential utility and site prep work in advance of construction.

3. Admission and Financial Aid Center (AFA)

- a. July 2017: Entered into negotiations regarding the construction guaranteed maximum price (GMP). Began preparing to bring the GMP to board for approval in August 2017. Construction began in fall 2017.

- b. Summer 2017: Relocated three student houses to new foundations north of Eighth Avenue in order to clear the AFA site.
- c. Summer 2017: Renovated and expanded 913 Eighth Ave. as the new home for CRSSJ. Razed the old facility (on the AFA site).
- d. November 2016: Identified the southwest corner of Eighth and Park as the optimal site for the facility.

4. Comprehensive Landscaping Plan

- a. December 2016: Completed the Campus Landscaping Master Plan, including a new design for campus exterior wayfinding signage.
- b. Summer 2017: Reached agreement on the preferred Phase I implementation elements, subject to design and budget constraints.
- c. Spring 2017: Agreed to split installation between Summer 2018 and Summer 2019 to avoid further campus disruption during the HSSC and AFA construction.

5. Zone of Confluence / Economic Development

- a. Acquired several critical properties in the zone of confluence, continuing our land banking strategy.
- b. March 2017: Retained an adviser familiar with Iowa economic development to help map a course for developing the zone over the next several years. Working to develop a detailed plan for creating an economically vital and aesthetically inviting connection between the Grinnell College campus and the downtown.
- c. September 2016: The state of Iowa granted final approval for Grinnell's Iowa Reinvestment District proposal — clearing the way for up to \$6.85 million in state retail sales tax revenues to be reinvested in a portfolio of five Grinnell community development initiatives. The proposal was developed in strong partnership with the City, to align planning and leverage external resources for local development. Included projects are:
 - Investment and development within the zone of confluence.
 - Downtown hotel.
 - Central Park improvements.
 - Downtown streetscape improvements.
 - Grinnell College Phase I projects.

6. Campus Space Planning

- a. Began developing a comprehensive long-term campus space planning framework and methodology.

2017–18 Actions

Phase I Projects

- Coordinate closely with architect (EYP/ASG), construction manager (McGough), and sub-contractors to ensure successful construction of the Humanities & Social Studies Complex (HSSC) and the Admission and Financial Aid Center (AFA).
- Diligently manage Phase I project costs within established budgets.

Zone of Confluence / Economic Development

- Actively explore opportunities for public/private partnerships in the Zone.
- Pursue new business opportunities to satisfy the Iowa Reinvestment Act award requirements.

Campus Space Planning

- Complete development of a comprehensive long-term campus space planning framework and methodology.

Strategy 4: Postgraduate Success

Staff Lead: Mark Peltz, Daniel and Patricia Jipp Finkelman Dean, Center for Careers, Life, and Service

Faculty Lead: Monessa Cummins, associate professor of classics

Goal: Instill an orientation to the future and intentionally connect the Grinnell educational experience to postgraduate endeavors. Create a curriculum and learning environment that enables and encourages students to pursue and succeed along multiple life paths and careers.

Objectives

- Provide opportunities for students to make connections between course experiences and other learning experiences (internships, externships, apprenticeships, fellowships, employment, service opportunities, travel, performances, etc.).
- Increase learning experiences outside the classroom.
- Guide students to reflect upon and articulate how their skills are applicable to their futures.
- Develop programs that facilitate networking and mentoring relationships between students and alumni.
- Expand career development support to young alumni.

2016–17 Progress

1. The 2016–17 academic year was marked by steady student engagement across CLS programs and initiatives, several exciting initiatives (including a trek to Berkshire Hathaway), nine distinct searches for new staff, and a great deal of preparatory work leading into the 2017–18 academic year.
2. Despite the departure of three key staff members, overall engagement across class years and other subgroups (first-generation, gender, ethnicity, etc.) remained steady when compared to student engagement during the 2015–16 academic year. (Approximately 70 percent of enrolled students availed themselves of CLS programs and resources).
3. Programmatic highlights from the 2016–17 year include: successful completion of a second pilot year of the CLS’s first-year advising initiative that engaged more than 75 percent of the class of 2020; five distinct treks connecting students with alumni and other professionals in finance, entertainment, education, policy, and other fields; a careers-in-finance symposium held in collaboration with Pioneer Capital Investments, the College’s student investment club; allocation of more than \$450,000 to 154 students pursuing unpaid summer internships; introduction of interview grants for seniors; expanded opportunities in the Service Learning Work-Study program, in which more than 50 students participate annually; and the second annual Spark Tank Innovation Challenge in which 40 different student teams submitted solutions to community-identified problems associated with poverty.

2017–18 Actions

- Advising and Exploration: In addition to training and orienting new staff members — Kirsten Fix and Stephanie Burrows — the Advising and Exploration Team will focus on holding individual advising appointments with 100 percent of the class of 2021 to ensure that each student understands the process and components of the CLS’s “My Journey” advising model, can identify their top five values, has a professional resume, and discusses their plans for summer 2018. Additionally, the Advising and Exploration Team will be working closely with the Career Communities Team to develop a seamless process by which students join one or more of the CLS Career Communities.
- Career Communities: The Career Communities Team will focus on orienting, training, and mentoring the new members of its team; creating and launching the Business and Finance, Government and Social Service, Law, and STEM career communities, and relaunching the Education Professions Career Community; developing a comprehensive programming calendar for the career communities that establish a baseline of services and introduce new traditions that students look forward to; and encouraging a pattern of regular individual advising sessions for students. Additionally, we will be recruiting and hiring directors for the

health professions and arts, media, and communications career communities during the fall semester, with expected start dates in January 2018.

- **Service and Social Innovation:** The Service and Social Innovation Team will focus on collaborating with CLS team members to fully integrate service and social innovation into the fabric of the CLS advising model; helping the Grinnell campus community understand how civic and social justice commitments are essential aspects of a holistic understanding of one's career; continue collecting and analyzing data related to service and social innovation endeavors in order to improve, align, and integrate programming and support services; increasing the percent of students who answer the volunteer survey by 20 percent; and, increasing student participation in service and social innovation workshops and educational initiatives by 10 percent.
- **Global Fellowships and Awards:** The Global Fellowships and Awards team will focus on engaging students and alumni in the discernment and application processes for global fellowships and awards, with a focus on the educational and developmental journey they participate in as they put themselves forward for these nationally competitive fellowships and awards. In doing so, Ann Landstrom will assemble and work with an array of faculty members through designated committees to identify and select nominees for both domestic and international awards. In her inaugural year at Grinnell, Ann is focused on sustaining Grinnell's historic tradition of excellence in preparing Grinnell students and alumni to compete for and secure these prestigious awards.
- **Employer Engagement:** The Employer Engagement Team will focus on researching, developing, and expanding regional, national and global partnerships with Fortune 500 organizations, entrepreneurial initiatives, and public sector and service organizations that lead to increased internship and postgraduate opportunities and networking opportunities; developing a marketing plan to promote Grinnell College and highlight CLS and employer engagement services to encourage connections between organizations and Grinnell students; collaborating with DAR to market employer engagement opportunities and services to alumni; hosting an interview day in Chicago Interview Day for a select group of leading employers; promoting four virtual career fairs; attending company-sponsored events to network and learn more about their recruiting needs (e.g., Morningstar Management Development Program Open House; Piper Jaffray Women in Business Forum); and reviewing new career management services (CMS) technology platforms.
- **Marketing and Communications:** The 2017–18 academic year will be marked by the introduction of several new initiatives in the CLS, and this will require a full-scale review of both the CLS's public-facing and internally-focused electronic and print marketing materials (e.g., website, GrinnellShare, student handouts, employer-focused materials). The CLS has briefly interacted with the College's marketing firm, Ologie. However, more time, expertise, and resources will need to be devoted to the CLS's marketing presence in order to fully capitalize on the distinctive qualities of this program.

- International Internships: In collaboration with the Institute for Global Engagement (IGE), the CLS will be researching and identifying possible pathways to expand the international scope of the internship program during the 2017–18 academic year. Members of the CLS and IGE teams will hold in-person or virtual meetings with staff members from IES Abroad, the Council on International Education Exchange, and the School for International Training. Depending on the outcome of this research, the CLS may aim to pilot a select number of internship internships during summer 2018. Ultimately, the goal is to outline a strategy for internationalizing the internship program over the next three years.

Strategy 5: Alumni Engagement and Philanthropy

Staff Lead: Jayn Chaney, director of alumni and donor relations; Adam Laug, director of development

Faculty Lead: Sarah Purcell, L.F. Parker Professor of History

Goal: Foster lifelong learning and contributions of alumni in the College’s intellectual life, service, and mentorship and advising. Design the Grinnell alumni community, the alumni-to-alumni relations, and the College-to-alumni relations by purposefully including alumni in all of the strategies.

Objectives

- Actively serve alumni in ways that they deem meaningful.
- Increase the quality and frequency of engagement activities of alumni with faculty, staff, students, and other alumni.
- Create engagement opportunities that reflect Grinnell’s commitment to academic rigor, independent thinking, service, and mentorship.
- Instill in each student a strong sense of attachment to the College, its mission, and its community.
- Foster a culture of philanthropy that recognizes the crucial role of alumni giving and provides alumni with meaningful opportunities to give back to the College community through their time, energy, expertise, and money.

2016–17 Progress

1. Total commitments for FY2017 reached \$32,827,711, which represents 136.7 percent progress to the \$24 million goal. The \$32.8 million represents an increase of more than \$5.8 million, or 21.7 percent, in new gifts, new pledges, and new bequests over FY16. The FY17 total is \$16.2 million more than Grinnell's five-year average.
2. Total cash receipts for FY2017 — one-time gifts, payments on pledges, and realized bequests — reached \$13,091,687 million against a goal of \$12 million. This is a 20 percent, or \$2.1 million, increase, over the FY16 receipt total of \$10.9 million and is 23 percent more than our five-year average.
3. In all, 10,540 organizations and individuals — including alumni, friends of the College, families of current and former students, faculty, students, and staff— were donors to the College in fiscal year 2017. This is a decrease of 7.3 percent from last year's total of 11,375. Among these, the largest number of donors (7,002) made unrestricted contributions. This year 6,719 alumni made gifts to the College. Of FY17's donors, 1,095 made their first-ever gifts to the College.
4. DAR generated \$5,450,798 in budget relief receipts. Our goal for the year was \$4.33 million. Of the \$5,450,798 FY17 total, \$3,550,193 came in the form of unrestricted support (Pioneer Fund), with the remainder of \$1,900,605 coming from restricted gifts. \$1,380,722 in unrestricted bequests was allocated away from the Pioneer Fund and redirected towards the Phase 1 facility project as a result of the Board's decision to utilize unrestricted bequests toward our capital needs, one of the College's top priorities. The net result was a \$262,924 deficit from the identified FY17 budget relief goal.
5. Development and Alumni Relations conducted 1,004 personal visits and made 373 qualification/disqualification assessments to continue building future pipeline for the success of Grinnell's campaign. Through a comprehensive training strategy facilitated by Plus Delta, meetings with prospective donors have become more strategically focused.
6. As of June 30, 2017, our campaign fundraising production total was \$95.4 million, surpassing Grinnell's last comprehensive campaign total of \$89 million. Led by campaign counsel Bentz Whaley Flessner and in partnership with trustees and College senior leadership, a campaign readiness assessment was delivered in April 2017, a critical milestone advancing Grinnell's campaign preparation.
7. With a banner year of success in closing almost \$33 million in new gifts and commitments, our campaign pipeline has been extended to \$40 million, \$10 million short of our FY17 goal. Several commitments were "closed" in FY17 that we anticipated would close in subsequent fiscal year; this was the largest factor affecting this. Our Phase 1 pipeline is lacking \$5 million-plus commitment conversations, and this will be an important metric to affect and track in FY18
8. Alumni and friends were introduced to a renewed website with responsive design. For registered users, the site also provides access to prepopulated forms, personal giving history, and class pages. Grinnell Connect, an e-platform fostering career connections among alumni and students, was released at the same time. In total, more than 5,000 accounts have been

- created between the two sites (2,098 on the alumni and friends site, and 3,187 on Grinnell Connect). The goal was to achieve a minimum of 500 active networking platform users.
9. All families of current Grinnell Students (international and domestic) were screened and researched. Top prospects coming out of that effort were assigned to gift officer portfolios. This research also informed the personal invitations we extended for international events in London and China.
 10. Reunion 2017 was the second-largest alumni gathering in College history. Along with 161 class volunteers, DAR welcomed 1,385 alumni and guests to campus. Guests came from 47 states, the District of Columbia, and 17 foreign countries. The five-year reunion class of 2012 set a new College record for best class participation at a reunion with nearly 50 percent of their class attending.
 11. We leveraged a number of priority volunteer experiences:
 - a. Grinnellians worldwide recorded 1,500 service hours as part of the 2017 Global Day of Service through 18 group projects in 24 states and seven countries. This event, our third, celebrates Founders' Day and the College's strong commitment to social justice.
 - b. With the partnership of more than 250 regional volunteers, the alumni relations team hosted 80-plus regional events, nearly double the regional alumni activity in the 2015–16 year.
 - c. The Student Alumni Council and Class Ambassador programs continued to thrive, hosting 116 virtual and live events, touching nearly all of the student body through their programming; total attendance at all student philanthropy events reached 3,061.
 - d. Alumni continue to support students' career explorations. Eighty-one alumni offered students 120 externships spots over spring break, and alumni support generated 85 summer Grinnellink internship opportunities.

2017–18 Actions

- Generate \$26 million in fundraising commitments.
- Generate \$12.5 million in cash receipts and meet the identified philanthropic budget relief goal of \$4.55 million.
- Continue to increase philanthropy education that manifests itself in increased dollars to the unrestricted Pioneer Fund and other budget-relieving funds, as well as increase the participation by alumni, families, faculty, staff, students and friends of Grinnell.
- Surpass \$118 million (cash, pledges, estate gifts, gifts in kind) in campaign fundraising with a specific focus on developing a stronger pipeline of support for Humanities and Social Studies Complex fundraising.

- Partner with Ologie and Bentz Whaley Flessner to develop campaign infrastructure and key tools including reporting, board education, volunteer engagement, communications, website, donor relations and plan for public launch.
- Conduct 950 personal meetings and evaluate 350 prospective donors through qualification and disqualification assessments.
- Extend the philanthropic/campaign pipeline to \$50 million, including a better assessment of and growth in the Phase 1 pipeline.
- Continue to expand alumni volunteerism across the spectrum of DAR volunteer leadership opportunities, with specific focus on a revitalized GRASP and CLS volunteer recruitment and engagement strategy.
- Host the inaugural Multicultural Alumni Weekend, celebrating Grinnell’s diverse alumni and student communities. Engage more than 100 alumni and students via this experience.
- Create and implement a new alumni engagement scoring model to more effectively track overall alumni engagement and relationship pipeline.

Strategy 6: The Management of Grinnell’s Infrastructure Resources

Staff Leads: Kate Walker, vice president for finance and treasurer of the College; Carlie VanWilligen, director of institutional research

Goal: Transform administrative practices to maintain continuous, collaborative, and adaptive planning for the College. Create a fiscally sustainable business model that supports the College’s continuing enhancements and maintains stability through variations in revenue sources and expenditure patterns.

Objectives

- Invest strategically in the College’s programs and facilities to ensure a high-quality educational experience.
- Develop a mechanism to support innovation by faculty, staff, and students that allows for experimenting and developing new programs, courses, and practices.
- Develop a research and development environment in operations, where appropriate.
- Actively manage the campus staffing and work environment to create an engaged community that shares a common sense of mission and purpose.

- Develop a culture of continuous planning and evidence-based decision-making.
- Reduce the reliance on the endowment for the operating budget.
- Maintain facilities and technology infrastructures that keep pace with campus needs and industry best practices. Configure facilities with the right technology and access to necessary data and primary source material to support emerging forms of inquiry-based learning.
- Make better use of College facilities during the summer.

2016–17 Progress

1. The Treasurer’s Office:

- a. Made progress toward the 45/45/10¹ revenue profile objectives, a 5-10 year strategy that relies on a combination of growing brand strength (Admission), building a culture of philanthropy (DAR), continued attention to the College’s cost structure (Treasurer), and effective use and replenishment of a portfolio of reserves (Treasurer).

2. The accounting and budget unit of the Treasurer’s Office:

- a. Completed Phase 2 of Fundriver software implementation to share data with DAR and ensure reconciled data feeds with the general ledger.
- b. Grants accounting processes and practices
 - Created a new grants accountant position and hired a full-time grants accountant experienced with grants administration.
 - Revised grants-related processes to deliver improved service and ensured compliance with funder requirements.

3. The college services and economic development unit of the Treasurer’s Office:

- a. Each of the five auxiliary services units — Golf Course, Dining Services, Bookstore, Conference Ops, and Mailing Services — prepared a five-year business plan to establish priorities, objectives, and operating targets for FY18 through FY22, with an eye toward optimizing revenue stream and reinforcing the value proposition of each operation.

4. The college services and economic development unit of the Treasurer’s Office:

¹ ”45/45/10” = 45% of revenue from endowment payout; 45% from net revenue from students; and 10% from gifts and other sources.

- a. Continued coordination with community enhancement to develop a plan and proposed financing strategy for an economically vital and aesthetically inviting connection in the zone between campus and downtown.
- b. Began discussions to explore feasibility of new markets tax credit and public-private partnerships in the zone.
- c. Worked with Community Enhancement, the City of Grinnell, and other partners to ensure success of Grinnell's application for an Iowa Reinvestment Act award. Received an IRA award worth ~\$6.85 million, to be realized through sales tax rebates commencing January 2020.

5. The Human Resources (HR) unit of the Treasurer's Office:

- a. Completed a review of the College's 403(b) plan fees and took action to significantly reduce TIAA's administrative fees.
- b. Carefully reviewed plan investment options and adopted changes to provide a diverse array of well-performing funds at lower fees.
- c. Successfully negotiated a one-year contract for FY17 with the new Union of Grinnell Student Dining Workers.
- d. Developed and launched a supervisor training program for new and continuing supervisors of staff and/or student workers.
- e. Took steps to reinvigorate a culture of civility, building on the work already completed in partnership with Staff Council.
- f. In collaboration with Staff Council, developed and implemented more robust staff recognition and professional development programs informed by the results of the spring 2013 campus climate surveys.
- g. Retained Willis Towers Watson to guide the staff compensation review. Some progress in FY17. Project will be completed in FY18.
- h. Retained Willis Towers Watson as benefits broker to analyze the College's benefits program against peers, best practices, and regulatory environment and provide recommendations to enhance effectiveness, competitiveness, compliance, and cost. Some progress in FY17. More to come in FY18.
- i. Partnered with the chief diversity officer to refine the College's staff hiring practices to eliminate implicit bias and introduce measures to recruit and retain a more diverse workforce. Received funding in FY18 operating budget for a new diversity hiring manager position.

6. Information Technology Services:

- a. Began developing a comprehensive strategic plan for IT projects, services, and governance. To be completed in FY18.

- b. Began work with communications and other campus departments to develop a comprehensive web governance structure.
- c. Continued efforts to create a consistent, highly responsive technology support structure to enable teaching and learning.
 - i. Received high satisfaction ratings from students, faculty, and staff for our technology services desk (≥ 86 percent in each of the four categories assessed: friendliness, knowledge, reliability, and responsiveness).
 - ii. Consolidated project management, financial administration, departmental administration and (enhanced) communications functions under one group (Core ITS Services).
- d. Implemented a project management infrastructure to promote the use of governance and structure, appropriate tools, and process/workflow improvements in IT projects.
- e. Addressed IT operational concerns of security and IT staff capacity gaps and adopted a two–three-year information security plan. A road map for the establishment of a cybersecurity framework has been developed.
- f. Cybersecurity is now a component of new employee orientation (Collegewide) and monthly educational material is sent to students, faculty, and staff in the *Campus Memo*.
- g. Implemented an acceptable level of service for IT requests based on industry best practices.
- h. Network infrastructure improvements included:
 - i. A new, direct fiber-optic connection to Internet2 (due to be complete this fall).
 - ii. Expanding our strategic “fiber loop” initiative, making significant progress towards a redundant fiber-optic backbone across campus.
 - iii. Upgrading core switches to expand our 10GB backbone and added 40GB capability.
- i. The College is now a full member of Internet2 and the InCommon federation.

7. Analytic Support and Institutional Research:

- a. Continued development and refinement of Core and Committee metrics. Began creating interactive displays of data for use by senior College leadership and the Board of Trustees. Will continue in FY2018.
- b. Helped develop the “resources, planning, and institutional effectiveness” argument and evidentiary files for Grinnell’s 2018 accreditation. Supported Academic Affairs in developing evidence for other criteria required in our assurance arguments. Will continue in FY2018.

- c. Continued research in support of all campus constituencies regarding student success and thriving. Led the planning and implementation of a third conference at Grinnell on this topic. Will continue in FY2018.
- d. Provided analysis and reporting related to multiple rating and ranking systems. Will continue in FY2018.
- e. Completed a number of qualitative research studies:
 - i. Student success study found a variety of factors that hinder and support students and provided a highly nuanced understanding of how these factors occur, are experienced, and overcome.
 - ii. Partners in Education: In-depth interviews uncovered how particular programmatic elements contribute to improved academic performance of participants and how the participants perceived the program and its staff.
 - iii. Continued follow-up interviews with students who are on one semester post-probation.
 - iv. Title IX Conduct Process: This study that sought to enhance understanding of the experience of going through the Title IX conduct process.
 - v. Conducted and transcribed exit interviews to inform the student retention quality initiative as well as admission decisions and advising.
 - vi. Completed an admission study to determine the factors that deter admitted students from high-income families from enrolling at Grinnell.
- f. Provided substantial support for Grinnell's quality initiative for the current cycle of accreditation. This initiative is focused on developing a deeper understanding of the multiple factors affecting persistence and completion.
- g. Provided substantial analytical support for the College Growth Task Force led by the dean.
- h. Provided substantial analytical support for the Office of Admission's market segmentation pilot project.
- i. Engaged in and supported the End-of-Course Bias Evaluation. This was an evaluation of end-of-course responses as it relates to faculty gender and race/ethnicity (as defined in our college-available data sets).
- j. Wrote papers and made presentations at a number of national conferences including an award-winning paper at the National Symposium on Student Retention. Invited to do a national Webinar in 2018 on our ongoing student success work.

7. The Office of Communications:

- a. Supported enrollment objectives

- i. Launched a new home page design for Grinnell.edu including home page video, calls to action (Request Info, Apply, Visit, and Give) are prominent, Faulconer Gallery and Athletics features provide more home page real estate for these areas, news and upcoming events are highlighted, and social media feeds are enhanced.
 - ii. Created new academics department template with more feature options with greater flexibility that allows departments to choose which features to enable new ways to display information, photo gallery slide shows, custom event listing, blogs, featured faculty/students/alumni/etc. infographics, social media feeds, and faculty publications.
 - b. Selected strategic marketing partner, Ologie, and initiated the comprehensive brand engagement in December 2016. Objectives for the initial scope of work include:
 - i. Develop a compelling visual and verbal language that accurately expresses the unique and distinct Grinnell educational experience.
 - ii. Develop a comprehensive set of brand guidelines that will serve as a tool kit for creating future brand assets.
 - iii. Raise the awareness, recognition, visibility, and reputation of Grinnell College with all audiences.
 - iv. Strengthen Grinnell’s competitive position relative to the colleges and universities with which it competes.
8. Student Affairs, the Registrar, and Academic Affairs:
- a. Worked collaboratively to develop an assessment tool to identify at risk students and appropriate intervention plans.
 - b. Implemented the first phase of emergency preparedness training.
 - c. Began to develop and implement an assessment process for students who participate in the student conduct system.

2017–18 Actions

Treasurer

- Successfully transition to new leadership following Kate Walker’s retirement in November 2017.
- Continue progress and collaborative efforts toward “45/45/10.”
- Diligently manage Phase I project progress and costs.

Accounting

- Identify opportunities to revamp and streamline business operations to gain efficiencies and reduce costs.

Human Resources, Compensation and Benefits

- Complete the staff compensation structure review and take action to implement recommended changes.
- Revamp staff recruiting, interview, and on-boarding practices to facilitate greater diversity in the College's work force.
- Evaluate opportunities to modify the benefits program to reduce costs without compromising scope or quality.
- Create and populate a centralized resource for division and department organizational charts (will be necessary for the accreditation process).

Facilities

- Assume leadership oversight of the Phase I building projects.
- Develop a comprehensive campus space planning framework.

College Services

- Strive to deliver quality service with break-even financial results at all auxiliary services units, with particular focus the bookstore and the golf course. Use the five-year business plans created in FY17 as a guide.

Economic Development

- Create a comprehensive plan and tactical sequencing to advance development of the zone.
- Explore and recommend options for introducing a College-subsidized program to motivate faculty and staff home ownership in Grinnell.

Information Technology Services

- Asset management
 - Assess potential new IT asset management and service management tools. A process review will be part of any implementation.
 - Reach the appropriate level of maturity in areas of information security by the end of FY19.
 - Continue to mature cyber security capabilities, including data governance, NIST cybersecurity framework implementation, and security awareness training.
 - Implement a cyber risk committee.
 - Disaster recovery and business continuity.

- Staffing
 - Complete operational transition to new ITS structure.
- Policy, Procedure, and Governance
 - Continue to develop and update technology policies and procedures.
 - Improve project management process development, including prioritization and portfolio management.
- Strategy
 - Strategically assess campus technology and ITS.
 - Develop and share a new strategic plan for ITS.
- Key systems selection, design, and implementation projects include:
 - IT asset management.
 - IT service management.
 - Linux network (MathLAN) assessment (ITS took over administration of MathLAN on 8/1/2017).
 - A new campus telephone (unified communications) system.
 - A new campus door-access system.
 - A new campus AV standard (in conjunction with HSSC and AFA building projects).
 - Consideration of data warehousing.
 - Student success platform.

Analytic Support and Institutional Research:

- Continue work on interactive displays of data for use by senior College leadership and the Board of Trustees.
- Continue research in support of all campus constituencies regarding student success and thriving. Will assist CLS in the planning and implementation of a fourth student success conference focused on postgraduate success.
- Provide ongoing, accurate, replicable, and timely response to internal and external requests for data.
- Continue to strengthen our research partnership with experts from RAND Corporation in California in the field of mental health research; prepare and submit grant proposal for funding of exploratory intervention work with the Division of Student Affairs.

- Explore options for research with the RAND Corporation (or others) in developing our own systems of alerts and predictive models related to student success, persistence, and completion. Will develop and test a micro-survey at Grinnell.
- Continue with major investments of time in support of work across campus regarding both our quality initiative and the development of the assurance arguments, the evidentiary files, and federal compliance documentation.
- Together with key faculty, continue development of a more robust data set to determine possible bias in end-of-course evaluations. Additionally, OASIR will investigate and prepare documentation for the Executive Council related to automation of end-of-course evaluations. If desired by the faculty, the office will implement and support transition to an electronic format.
- Prepare the final evaluation, analysis, and report related to the multiyear grant-funded “belonging study.”
- Support discussions and evaluation of software used in the Division of Student Affairs to capture student contact and intervention data.
- Undertake a qualitative study around factors that contribute to students’ major choices, particularly when students change from their intended major at the time of arrival or application.

The Office of Communication

- Lead a comprehensive brand engagement that includes:
 - Finalizing initial scope of work with strategic marketing partner that focuses on creating the brand strategy and creative direction.
 - Developing a campus brand socialization and roll-out plan.
 - Transitioning to engagements that support enrollment, fundraising, and digital strategy.
- Continue strategic national, regional, and trade media relations program:
 - President Kington as thought leader
 - Faculty op-eds and placements as experts in their fields
- Restructure the Office of Communications to achieve:
 - Improved service to campus partners.
 - Adoption of integrated strategic communications principles.
 - Increased efficiency in the production of communication materials.

Appendices and Links to Reports

Link to Report from Task Force on Residential Learning

Appendix I: Report from Task Force on Student Mental Health

What Have We Learned from Our First Year?

Student Mental Health Task Force

August 30, 2017

I. Prevention and Wellness

1. Our local context matters. Our intense academic culture set in a rural environment creates additional sources of stress and anxiety for many students. (Note, for example, our research on student sleep and mental health.) Three conclusions flow from this:
 - We need to pursue multilevel, contextual interventions, not just individually centered ones.
 - We need extra efforts to reach our international population and domestic students of color.
 - Work needs to be coordinated with our larger residential strategy.

2. We are doing several things very well:
 - We convey a positive message about mental health needs and support, helping reduce stigma.
 - We have achieved increased collaboration among wellness, prevention, and student affairs.
 - Student awareness of mental health resources and how to access them has increased.
 - Students are seeking further information and training for themselves and their peers. They want to be involved in a positive way.

3. We face several challenges related to communication:
 - There is a lack of congruence between what the campus community expects and what our capacity can provide. This issue needs to be addressed from the outset, potentially even in communication by the admission office.
 - Some students still hear negative messages from each other regarding SHACS.
 - We need to improve internal communication to promote and share what we offer so that students who need help will make use of our resources.

4. We have defined several key goals:

- To determine our capacity and expectations —t his will guide what we offer.
- To lower barriers and increase the perceived benefits of accessing SHACS.
- To increase outreach to different groups on campus, including international, DSOC, and first-generation, through different means, including social media or peer educators.
- To increase programming and information provided to faculty and to increase faculty engagement in these efforts.
- To promote a holistic approach to mental health among students (including sleep practices).
- To continue to address mental health at the environmental level.

II. Services

1. We face challenges in delivering mental health services due to several factors:

- Significant rates of depression and anxiety as reported by students through our survey. While high percentages of those with serious and persistent mental illness do receive treatment, lower percentages of moderate and mild cases do. This is to be expected in some respects, yet it also suggests that in areas where we may be able to have the greatest immediate impact our scope is limited.
- Students demonstrate a wide range of conditions, from mild and moderate through severe, including depression and anxiety, panic attacks, drug and alcohol use, and suicidal ideation.
- In the absence of viable referral options, we spend significant amounts of time addressing the most serious cases.
- The intensity of our culture is compounded by the lack of student knowledge and practice regarding self-care and stress management.
- We face limits in the number of direct clinical hours.
- We face limits in terms of physical space.
- Student awareness of service options limits use of resources.
- We may need additional personnel, but recruitment and retention of staff are challenging.

2. We need to determine goals for reasonable, responsible, and sustainable levels of service:

- The SHACS mission and core services need to be clearly defined and articulated.
- We need to clarify our current service model and determine if alternatives should be considered.
- We need greater analysis regarding student use of SHACS, referral patterns, and satisfaction with treatment.
- We need to analyze and review our delivery model and referral patterns.
- We need to gain better data regarding prevalence.

III. Overall Conclusions

1. Grinnell cannot effectively meet all needs for all students.
 - We cannot deliver inpatient, residential, or year-round care.
 - We may not be able to serve as the primary providers in terms of alcohol and other drug abuse.

2. Given the absence of viable referral options, we may need to provide a wider range of services than other institutions, including:
 - Individual therapy
 - Group therapy
 - Videoconference therapy
 - Videoconference psychiatry
 - Substance abuse counseling
 - Skills workshops
 - Clinical assessment
 - Outreach and education
 - Faculty and staff training
 - Trauma and crisis support
 - Transportation in cases where a referral is needed

Appendix II: 2016–17 Innovation Fund Projects

Pilot Projects

Bringing CERA to Campus: An Environmental Monitoring Array for Teaching, Learning, and Research

Contact: Andrew Graham, assistant professor of biology; Peter Jacobson, professor of biology; Vince Eckhart, Waldo S. Walker Professor of Biology; Kathy Jacobson, professor of biology; Elizabeth Hill, CERA manager and Center for Prairie Studies outreach coordinator

The project will install an array of environmental monitoring tools at the Conard Environmental Research Area (CERA), develop data-rich learning activities utilizing the array, and increase virtual and physical access to the area. This will positively impact existing courses, promote multi- and inter-disciplinary faculty/student collaborations across natural and data sciences, and open up new research opportunities. It will provide students with opportunities to make meaningful contributions to solving local and global environmental problems.

U.S. Course-Embedded Travel

Contact: Elaine Marzluff, professor of chemistry; Sarah Purcell, L. F. Parker Professor of History; Stephen Andrews, associate professor of English

This project will develop a program for domestic course-embedded travel by supporting U.S. trips to enhance student learning and provide for faculty/staff development. The program will allow a more diverse array of faculty, staff, and students to experiment with integrative learning approaches outside of the campus context.

Meskwaki Students and College Access

Contact: Deborah Michaels, associate professor of education

This project will connect the students, faculty, and staff of the Meskwaki Settlement School with the Grinnell College community through a series of inter-community exchanges. It will create a college access summer camp of liberal arts courses for a group of Meskwaki high school students. The project will also provide the opportunity for faculty to develop curriculum and teach students from a different cultural, linguistic, and ethnic background than is currently represented on our campus.

Vivero: Digital Scholarship Student Fellows Program

Contact: Mirzam Pérez, associate professor of Spanish; Rachel Schnepfer, associate director for academic technology; Elizabeth Rodrigues, assistant professor, library

This project will create a trained cohort of student fellows in the digital liberal arts by combining a program of intensive training with comprehensive mentorship. The program will develop a sustainable support system for digital scholarship on campus and will encourage a diverse group of students to pursue transformative, innovative digital research.

Curricular Implementation of the Digital Liberal Arts

Contact: Erik Simpson, professor of English; Sarah Purcell, L. F. Parker Professor of History

This project will develop and provide curricular support for digital liberal arts courses that will function as pilot projects for a proposed implementation of a new interdisciplinary concentration in digital studies. The project will support a faculty summer workshop for generating this proposal.

Inclusion Inspires Innovation: Developing Accessibility Expertise with Primary Users

Contact: Eliza Willis, professor of political science; Autumn Wilke, coordinator of disability resources

This project team will create a group of on-campus experts that will review physical and programmatic barriers that prevent disabled members of the College community from participating fully in campus life. The project will support training of both students and faculty/staff as “primary user experts” to study accessibility and then in turn train other individuals to carry the work forward.

Planning Projects

Racing Iowa

Contact: Stephanie Jones, assistant professor of education; Deborah Michaels, associate professor of education

This planning project will identify and connect Grinnell College students and faculty to State of Iowa resources that can serve to enhance and inspire courses on issues related to race and improve the social networks and sense of belonging for Grinnell students of color. The project team will collect statewide resources related to Black, Latino/a and Native American communities; connect Grinnell’s students of color with relevant groups at other institutions to foster collaboration; and build a digital website featuring relevant resources for faculty, students, and staff at Grinnell College.

Grinnell College Immersive Environments Lab (GCIEL)

Contact: David Neville, digital liberal arts specialist

This planning project will explore the idea of a laboratory for designing, developing, evaluating, and distributing immersive three-dimensional (3-D), virtual reality (VR), and augmented reality (AR) environments for use in teaching and research contexts. The project will support a faculty summer workshop about immersive environments.

Developing Robust 3-D Printing Capabilities at Grinnell College

Contact: Joshua Sandquist, assistant professor of biology

This planning project will consider specific ways to make 3-D printing more broadly accessible across campus. The project will investigate innovative ways to use 3-D printers in the liberal arts curricula and achieve pedagogic advances for the technology on campus.

Preparing for Accreditation

Grinnell's next reaccreditation review is scheduled for November 2018. Considerable progress has been made in writing several drafts of the assurance argument for this review. In the year ahead, OASIR will need to work closely with the authors of the assurance argument in creating evidentiary files to support the arguments. Also, a great deal of work remains in preparing federal compliance materials and the evidence related to the assessment of academic achievement given both Grinnell's relatively unusual "open curriculum" and the concerns about this topic that were raised by the visiting team in 2008. We are planning to have at least a good start on a data book for the College, perhaps using Power BI as recommended by ITS, by the time of the visit. Also, we will need to help in describing follow-up work from the administration of the Chronicle of Higher Education's "Great Colleges to Work For" survey (a campus climate survey) that was done in 2013.

Core and Committee Metrics

During the past four years, our office has worked together with the senior leadership of the College and the trustees to develop both the core and committee metrics which are updated for each board meeting during the academic year. The current process for maintaining and updating the data (in interactive electronic form for Core Metrics and paper for Committee Metrics) is working and economical but it is labor intensive. Our office plans to work with ITS to explore Microsoft's Power Business Intelligence (BI) platform as a potential way to reduce our workload and improve the presentation through more advanced graphics and by providing users with the ability to drill down into details of the data — still at low cost.

Student Success Research

We expect our heavy investment in student success research to continue in a variety of ways including completion of the College's Quality Initiative, contracted efforts, annual conferences on this topic, qualitative research, specialized in-house analytical work such as grade dynamics and the development of micro-surveys and the Thriving Quotient instrument, and other work with the Higher Learning Commission. More detail about all of this is provided below.

Qualitative Research

In response to a request from President Kington, Georgeanna Robinson has conducted 29 interviews with parents and students who indicated strong interest in Grinnell but ultimately did not enroll, and a few who did enroll. Transcribing these interviews and analyzing the data will require a great deal of her time in the fall.

Other projects high on her priority list include additional transcription of new exit interviews and preliminary analysis, and additional interviews with students coming before the Committee on Academic Standing. This latter study involves two interviews: one when the student is put on strict academic probation and one the following semester. Given the few students who were on strict probation last semester, an additional semester of first interviews is needed, in addition to the four second-semester interviews she will conduct.

Mental Health Research

Our current contract with the RAND Corporation, funded by President Kington, expired on June 30. To date, this work has produced a new mental health survey piloted on our campus during the spring 2017 semester; we expect a series of publications to follow from the work. There are three next steps envisioned at this time: 1) additional publications from the survey work already completed, 2) the development of materials for grant applications, and 3) increased collaboration with Student Affairs staff as we explore with the RAND researchers alternative care models for Grinnell and similar college campuses.

Our office (Kaitlin) will also continue to be involved in the analysis of practice management at SHACS.

Policy Development and Implementation

During the past year, OASIR developed and gained approval for a written policy on survey administration at Grinnell. In the fall, we will need to test and implement the administration of this new policy.

Also, as a result of intense interest in recent qualitative research results, our office has drafted a new policy on the distribution of all of our IRB-approved research results. This policy is connected to ongoing work in ITS regarding data sensitivity and associated classification. We plan to finalize work on this policy during this calendar year.

Micro Survey Design and Implementation

One of the key lessons we have learned from our work on predictive modeling with Civitas Learning is the need for higher frequency data on student performance and more on our students' social-psychological state (including intentionality) than is currently available at Grinnell. While we have been talking about implementing micro-surveys for several years, we have not yet acted. Such surveys might provide another low-cost but effective way to improve alerts and predictive models for the College.

End-of-Course Critiques

The Executive Council has indicated strong interest in reviewing and perhaps improving our processes for end-of-course critiques. We have preliminary estimates and quotes from Scantron for web and paper-based solutions. We need to continue to explore such solutions and to bring a recommendation forward to the Executive Council and the president.