

SCHREYER

HONORS COLLEGE

Strategic Plan
2015-16 to 2019-20

In the Schreyer Honors College lives are transformed, friendships are made, experiences create lasting bonds, and ethical, global leaders are shaped.

Mission

The mission of the Schreyer Honors College is to promote:

1. Achieving academic excellence with integrity
2. Building a global perspective, and
3. Creating opportunities for leadership and civic engagement

Vision

1. To educate men and women who will have an important and ethical influence in the world, affecting academic, professional, civic, social, and business outcomes.
2. To improve educational practices and to be recognized as a leading force in honors education nationwide.

Introduction

The following strategic plan builds upon the eighteen-year success story of the Schreyer Honors College (SHC) and the strong academic foundations of the University Scholars Program that was first established in 1980. As we approach the 20th anniversary of the SHC, it is widely considered [the premier honors college](#) in the nation, serving as a model for others to emulate.

An honors college is only as good as the University that it is a part of and the success of the SHC stems from the fact that Penn State is in the top 1% of all research universities in the world. As a result of this strong foundation and the unique mission and vision of the college, the Schreyer Honors College was recently ranked the nation's top public honors college, and has been for the last decade. More importantly, we have also seen an increase in the number of our students winning national fellowships and scholarships, growing strength in placement in top graduate and professional schools, and employment rates of our graduates.

For high achieving undergraduate students, the academic reputation of Penn State is defined through their engagement with the SHC through admissions visits, the [SHC website](#), and ultimately as enrolled Schreyer Scholars.

A guiding principle of the SHC is that an honors college should not be a cloistered environment for just a chosen few. While the number of those selected is of necessity limited, the benefits of the honors college should reverberate throughout the university. This means that honors courses are open to any who wish to challenge themselves, lectures and special events are open to the entire Penn State community, and pedagogical methodologies that may be tested within

honors courses and found to be successful and scalable are made available to the entire university.

These basic principles of representing the entire University and being of benefit to the entire community are the basis upon which the following plan has been developed.

How to Read this Strategy

Past strategic plans and the 2011 report from the University Park Academic Review Coordinating Committee (UPARCC) were consulted. Reference should be made to [our response](#) to the [UPARCC report](#); throughout this plan their recommendations will be cited, e.g., “(UPARCC 1)”. The [Framework to Foster Diversity](#) has now been incorporated into this strategic plan; the seven challenges will be cited, e.g., “(Challenge 1)”. This strategic plan should also be read in consultation with the University Strategic Plan for the same time period.

Ethics and integrity, including developing a diverse and supportive environment, are integral to the mission and vision of the SHC. Thus the reader will find these principles woven into each of our strategies, even when not highlighted.

Finally, where the SHC plan lines up with President Barron’s six initiatives it will be so indicated. Those initiatives are:

1. Excellence
2. Student Engagement
3. Economic Development and Student Career Success
4. Diversity and Demographics
5. Access and Affordability
6. Technology and Curriculum Delivery as foundational principles, along with Sustainability and Global Engagement.

Strategic Objectives

1. Align with the University

The SHC must be integrated with all aspects of the University to fully reflect the Penn State University community.

2. Build Diversity

Expand the overall diversity of the college to create and maintain an environment where students are a part of a community that is vibrant and varied in terms of, for example, origin, ethnicity, political views, sexual orientation, and religion.

3. Enhance Academics

Raise the quality of the academic experience of Scholars, honors faculty, and advisers. The exceptional quality of work produced throughout our community helps to consistently set new standards of excellence for Penn State and peer institutions. Over the past two years, the following have been initiated: Thesis support programs, required scholarly presentations for funded research projects and Recording of Academic Research (ROAR).

4. Promote Knowledge Creation

Expand opportunities for students to communicate their learning, research, writing, and contributions to knowledge creation. Measure and assess via surveys and tracking of publications and presentations.

5. Expand Global Opportunities and Participation

We will support building a global perspective to make sure our students truly have a broad sense of the world by increasing the percentage of Scholars who have an international experience from 45% to 60% participation rate within 5 years. Ensure a strong offering of SHC specific travel opportunities and continue to partner with OGP and other units. Provide a guaranteed travel stipend for each student to use during his or her time as a Schreyer Scholar. Funds will be secured before announcing this initiative.

6. Shape Leaders, Launch Careers

Design and offer leadership formation programs that coordinate with other University offerings. Such programs should include training and experience-based opportunities that focus on the importance of ethical leadership. Continue the strong record of preparing Scholars for their chosen careers and fields of research. Nearly 45% of Scholars go directly into graduate/professional school and of the remaining 55% almost all are employed or in volunteer positions upon graduation. In both programs we will continue to draw upon support from our alumni.

7. Share the Schreyer Secret

Build national awareness of the SHC among target audiences.

Strategies to Achieve Objectives

Key

- Strategies may cut across several objectives.
- Strategic initiatives are critical to the launch of this plan and are either completed or currently in process.

SHC strategic objectives (p. 4) are indicated **by number in BLUE**.
President Barron's initiatives (p. 3) are indicated **by number in RED**.

1. Create University partnerships (UPARCC 1, 2, 3, 5, 6; Challenges 1, 2, 3, 4, 5)

With the support of the President and Provost, partner across the University (e.g., the Colleges, Commonwealth campuses, undergraduate admissions, Educational Equity, and financial aid) through proactive communication, formal partnerships, leading coordination efforts and joint appointments to enhance recruiting, diversity, admissions, advising, academics, development, sustainability and complete student health support.

Objectives supported:

1, 2, 3
1, 4, 6

Measures/Metrics:

Many relationships already exist, such as the Paterno Fellows Program in Liberal Arts and collaboration with the Undergraduate Admissions Office (UAO). Additional and more formal relationships will continue to be established.

Budget impact:

In most cases there will be no budgetary impact. Possible joint appointments with UAO and CAPS would require appropriate funds for shared salaries and benefits.

2. **Promote best practices in honors education** (UPARCC 1, 5, 6; Challenges 2, 3, 5)

Develop, implement, and promote a “best practices” model for faculty, advisers, and Scholars to enhance honors education across the colleges addressing honors courses, faculty advising, thesis advising, and thesis writing. The model will include training, support, expectations, measures, recognition, and rewards. This will include the continuation of the annual “Honors Advising and Teaching” (HAT) Conference for faculty and advisors to provide updates, best practices, training and information sharing opportunities.

In our efforts, we will continue to promote integrity and ethical behavior in all that we do. We will also support and disseminate the work of the newly-formed [University Office of Ethics and Compliance](#). These values include the highest standards of ethics, honesty, and integrity by promoting a culture that encourages ethical conduct and a commitment to compliance with legal and regulatory obligations.

Objectives supported:

1, 2, 3, 4, 6

1, 2, 3, 4, 6

Measures/Metrics:

Some work has begun in this area including the HAT and the collaboration with colleges and departments to create theses guides that reflect the best research methods practices of each discipline. Within the time-frame of the strategic plan a full model will be developed.

Budget impact:

There should be little to no budgetary impact.

3. **Create an assessment program for Honors Education** (UPARCC 1, 5; Challenges 3, 5)

Lead the nation by creating the first assessment of the honors experience. There does not exist any sort of tool to assess the quality and impact of honors education on a student’s collegiate experience. Such a tool will be developed with Penn State resources such as the Schreyer Institute for Teaching Excellence. This is a major undertaking and is in fulfillment of our vision “to improve educational practices and to be recognized as a leading force in honors education nationwide.”

While we currently do various surveys to determine, e.g., students’ experiences in the SHC relating to coursework, advising, study abroad, and cultural climate, there does not exist a systematic and

unified program of analysis. We will create a full program that will begin with baseline assessment of incoming first-year and Gateway students and culminate with senior surveys to not only gather the data we currently acquire, but to truly *evaluate* their honors experience in relation to the mission and vision of the SHC.

Objectives supported:

1, 2, 3, 4, 5, 6, 7
1, 2, 3, 4, 5, 6

Measures/Metrics:

This does not yet exist either here or at any other university. The goal at this stage is simply to create such a tool, then we will be able to set metrics based upon those factors assessed.

Budget impact:

Utilizing university resources, there should be little to no budgetary impact.

4. Build an engaged community (UPARCC 2, 3, 6; Challenges 2, 3, 4, 6, 7)

Engage Scholar alumni, current and past scholar parents, and donors and friends to support the college in recruitment, education and development, mentoring and career placement.

The SHC already has a very robust program for engaging alumni and parents, e.g., over 500 alumni who interview prospective students and the first college at Penn State to have a Parents Council. We need to build upon these relationships for the further support of our students and particularly with regards to building a more diverse community.

Additional goals include:

- Further develop alumni mentoring program with specific focus on recruitment of Under Represented Minority (URM) students at both the first year and Gateway admissions and further support of the same community. (See next objective.)
- Define an alumni contact tracking process and establish systems support as available.
- Consider creating a future alumni ambassador program within each Scholar class to assist with recruitment of senior Scholars.

Objectives supported:

1, 2, 3, 4, 5, 6, 7
1, 2, 4, 5, 6

Measures/Metrics:

The number of alumni, parents, and friends of the college engaged serve as one set of data. The students engaged another. Reference to data developed through the assessment program (see above) will ultimately provide detailed metrics.

Budget impact:

Resources, primarily staff time, within the development office, career development office, and technology will need to be allocated.

5. Expand and enhance SHC diversity (UPARCC 1, 4, 5, 6;

Challenges 1, 2, 3, 4, 5, 6, 7)

Draw upon faculty, students, staff, and alumni to create and foster a diverse and inclusive educational experience. The SHC has long been committed to developing and supporting a diverse community, in terms of faculty, staff, *and* students. Yet current tactics have yielded little change specifically in the diversity of the SHC student body.

Tactics to achieve this goal (see Appendix 2) will include, but not be limited to collaboration with UAO, campuses, and colleges in order to recruit students of underrepresented populations, specifically African American, Hispanic American, and Native American. We will engage our alumni from these communities to assist us in recruitment.

The SHC Diversity committee will also be revitalized with new appointments of both faculty and students. We will seek their advice and guidance for all levels of diversity concerns from admissions to advising to programming.

Finally, we will continue to work with our HR support in the President's office, following the University's best practices, to advertise and recruit applicants for all job vacancies.

Objectives supported:

1, 2, 6, 7

1, 2, 4, 5

Measures/Metrics:

Student Goal: Increase URM representation to 10%; non-PA representation to 30% in 5 years. Demonstrate efforts to diversity staff through appropriate hiring processes.

Budget impact:

Any additional scholarship funds will need to be raised, but most other expenses are simply a matter of allocating existing resources.

6. Deliver digital content (UPARCC 1, 5, 6; Challenges 2, 3, 5)

While internet access is not universal it is ubiquitous. Parents and prospective students use the internet to research schools while current students take courses and receive news and updates through Penn State services. We will build upon current online webinars for admissions and explore using digital delivery systems to expand the reach of honors courses and programs.

Examples of efforts will include piloting digital delivery of leadership events/programs to provide access to more Scholars including those at other campuses and non-traditional Scholars. The pilot may partner with Penn State World Campus and leverage established delivery systems.

Objectives supported:

1, 2, 3, 4, 5, 6, 7

1, 2, 3, 4, 5, 6

Measures/Metrics:

Analytics from current admissions offerings will be compared with future efforts. Other programs will be first-time offerings and analytics will be collected and analyzed accordingly.

Budget impact:

Marginal and will need to be allocated within relevant budget.

7. Grow scholarship opportunities (UPARCC 2, 6; Challenges 2, 3, 7)

Broaden the types and sources of scholarships through ongoing creative engagement with the Provost, the University Admissions Office, other Penn State colleges, and donors, or by reallocating funding.

Complete the annual development plan that will include increased use of social media and will be focused on scholarship funding.

Objectives supported:

1, 2, 3, 4, 5, 6, 7,

1, 2, 3, 4, 5, 6

Measures/Metrics:

Goals for development will soon be set for the next Penn State campaign.

Budget impact:

Management of current donors is vital and we have recently, with the Provost's support, added a Stewardship Coordinator to our development staff.

8. Provide support for holistic well-being (UPARCC 1, 4, 6; Challenges 2, 3)

In the face of the growing demands facing high-achieving students, and requests from our students, we are committed to teaching our scholars coping mechanisms that will lead to their overall success, not just intellectually, but in their physical and mental health and well being. Scholars face the usual challenges of all college students: stress, social adjustments, sexual identity, substance abuse, sexual assault and others. In shaping leaders who shape the world, we must also equip our students with the knowledge of how to cope with life's non-academic challenges.

Objectives supported:

1, 2, 3, 4, 5, 6, 7

1, 2, 3, 4, 5, 6

Measures/Metrics:

Surveys used in the new assessment plan (see Strategy 2, above) will include as appropriate questions to gain some baseline understanding of students' needs. Exit surveys will gather data regarding whether they feel their needs have been met.

Budget impact:

It is not expected that the SHC would add any new staff, rather we would build partnerships with CAPS. Still some funds for programming and events will need to be allocated from existing budgets.

9. Support Global Initiatives (UPARCC 1, 2, 6; Challenges 1, 2, 3, 4, 5)

As the second point in our mission, the SHC has supported international experiences for our students since the foundation of the college in 1997. Nearly 45% of all Scholars study abroad. In the next five years we will seek to achieve 60%. Known challenges include funding, domestic curricular commitments within majors, and internship needs.

"Building a global perspective" is also not limited to actually travelling abroad. We will continue to host international scholars and guests, offer various events, and course offerings that provide students with a truly global perspective.

Objectives supported:

1, 2, 3, 4, 5, 6, 7

1, 2, 3, 4, 5, 6

Measures/Metrics:

Current baseline at graduation is close to 45%. Incoming student surveys (see Strategy 2) will help us understand their “perspective” on the world and not just where they have traveled.

Budget impact:

The Schreyer Ambassador Travel Grant pool must be greatly expanded and will be a major goal of the next capital campaign.

10. Develop an integrated communications and marketing program (UPARCC 1, 2, 3, 6; Challenges 1, 2, 3, 4)

Develop an integrated communications and marketing program to build awareness and engagement. Develop and deploy an integrated annual communications, marketing and recruiting plan that focuses on a manageable set of clearly defined target audiences. (See Appendix 2) The following audiences will be targeted:

Potential Scholars and their families
High school guidance counselors
Underrepresented communities

Scholars
Scholar parents

Faculty and Staff
Scholar alumni
Donors and Friends
Corporate recruiters

Objectives supported:

1, 2, 3, 4, 5, 6, 7

1, 2, 3, 4, 5, 6

Measures/Metrics:

Increase in news citations, web impressions, and other analytics.

Budget impact:

Communications already has a significant budget, this will be done within the current allocation.

11. Explore possible growth of freshmen gate (UPARCC 1, 2, 4, 5, 6; Challenges 2, 3, 7)

The Provost has directed the SHC to undertake a feasibility study to incrementally grow the freshman gate by up to 25% in the next five years while maintaining the quality of the Scholars admitted.

Findings will be reported to the Provost for final decision regarding such an expansion. (See Appendix 1) Included will be first pass estimates of the sequence of the build-out and funding needed in these areas:

- a. Faculty
- b. Advising
- c. Facilities
- d. Scholarships
- e. Processes and systems
- f. Admissions marketing and recruitment
- g. Administration
- h. Student programs
- i. Career services
- j. Campuses and colleges impact, roles and responsibilities
- k. Evaluate partnering with academic colleges to expand sophomore and junior gate programs to increase Scholar class size

Objectives supported:

1, 2, 3, 4, 5, 6, 7

1, 2, 3, 4, 5, 6

Measures/Metrics:

See Appendix 1

Budget impact:

See Appendix 1

Appendix 1: Resources Required for Expansion of Freshman Gate

Implementing the changes outlined above will require additional resources, particularly if we increase the size of the incoming first-year class.

1. Academic Excellence Scholarship (AES)

An increase in 25% enrollment at the Freshman Gate would lead to a (maximum) total of 1,500 students receiving the AES.

Starting in 2015 this will be \$4,500 per student, making the total increase per year **\$1,350,000**.

2. Recruitment

The recruitment of a larger and more diverse pool will require additional funds for travel and materials (**\$10,000**) and an additional staff member on the admissions team, roughly **\$75,000** including fringe. *This cost could be shared with a joint hire with the University Admissions Office.*

3. Course Support

The increase in the number of courses required to accommodate these students with the current subsidy rate of \$1,700/credit would require an additional **\$44,200**.

4. Faculty Support

The course stipend does not meet the cost of a tenure-line faculty member nor does it address the need for tenure-line and tenured faculty to supervise theses in Scholars' senior year. Ensuring the support of Scholars through their Penn State career would require **additional faculty hires in key areas** such as Finance, Accounting, BMB, Biology, and Psychology.

5. Grant Support

In addition to the \$350,000 we currently award Scholars to pursue international, research, and internship opportunities a further **\$50,000** would be needed to ensure support at the current levels.

6. Student Programming Support

An additional **\$22,000** would be required to support the expenses of a larger orientation.

Total estimated resources required: \$1,551,200

Appendix 2: Admissions Related Tactics

Supporting Strategic Objectives: 1. Align with the University

7. Share the Schreyer

Legacy

Evaluate the feasibility and develop a plan to expand the freshman gate class size by 25% over the next five years while maintaining the high quality of the Scholars admitted.

Impact on Recruitment

The applicant pool for fall 2015 was the largest in the history of the SHC—3,721.

Despite this record number, we need to continue to increase the pool in order to grow the overall class size incrementally over the next five years and, more importantly, maintain the quality of the incoming class.

The following resources would be required:

- Increased recruitment both in- and out-of-state
 - *Increased staffing*—Staffing resources for recruitment trips are already spread thin between the Associate Dean for Student Affairs (ADSA) and the Admissions Coordinator. To add additional trips would compromise other, vital duties. For example, the ADSA should not travel to the extent required with such growth in recruitment. Having an additional position in admissions would alleviate that concern.
 - *Increased budget*—An estimated \$10,000/year would cover a number of additional recruitment trips and materials.
- Addition of a fourth on-campus event (Scholars Day)
 - Our yearly evaluations show that students are more likely to apply or accept an offer if they have visited University Park. Over the past two years, our Scholars Day events have been overwhelmingly successful.
 - *Increased staffing*—the Administrative Assistant to the Admissions Coordinator takes on most of the responsibility for setting up on-campus events. The addition of a staff member (cited above) would be able to manage these events.
 - *Increased budget*—approximately \$2,000
- Increased social media presence
 - Today's students are very connected to online sources of information. Our coordinator of college relations is developing

this strategic approach, and the admissions team will be supportive of that plan.

- Increased Faculty Selection Committee
 - We currently have a committee of 150 faculty members to read applications. In light of our recent application pool of nearly 3,300 applications, more than 160 would have been ideal. Several members went above and beyond what we asked of them, which enabled us to so we were ultimately able to evaluate all applications in a timely fashion. With an increase of applications, in order to grow the class overall we will need closer to 200 members on this committee.

Impact on the Living Learning Community/Housing

Over a five-year period, the 25% increase would:

- result in a community that is 90% Scholars vs. 64% Scholars
- reduce the number of available rooms for “independents” entering through lottery
- the early arrival housing fees (for Schreyer Honors Orientation) would rise by an additional \$4,875 (\$69/student for three days).

Impact on Orientation/Programming

An increase in the incoming first-year class would result in a need for additional funding and staffing for NSO and Schreyer Honors College Orientation (SHO TIME) programming.

We estimate costs to increase as follows:

- current cost per student at SHO TIME is \$150, or \$45,000 for 300 students
 - anticipated increase will be \$56,250 for 375 students
- current cost per parent at NSO is \$30, or \$15,000 for 500 parents.
 - anticipated increase will be \$19,500 for 650 family members

There would also be an overall increase in the cost of books, supplies, program materials purchased and printed, number of orientation leaders required, and the corresponding cost of feeding and housing the leaders.

In addition, we will develop departmental partnering model of joint appointments with admissions and advising. Financial aid will be addressed in year two. Key issues will be funding as well as establishing management responsibilities, expectations, measurement, and rewards for the joint appointees.

Supporting Strategic Objective: 2. Build Diversity
Increasing the URM representation to 10% is not impossible, but may be one of the more challenging aspects of the strategic plan.

Increasing this population has been a goal since the founding of the Schreyer Honors College and a priority since 2006. The Admissions Coordinator has significantly increased the number of events with URM (African American, Hispanic American, Native American) students. Unfortunately, we have yet to see a significant change in our yield of URM students. Under-represented students make up approximately 8% of the applicant pool (which is an increase over previous years) and that percentage remains constant for those who are actually enrolled in the fall of 2015. We should continue our current efforts, while developing new opportunities and strategies.

Efforts must also be made to encourage URM students to enter the SHC via the Gateway. In the past such students have been discouraged from applying to honors by some advisors in their academic unit. This will require education of our faculty, staff, and students in order to affect change.

Additional scholarship funding has often been targeted as the solution to increasing diversity in the SHC. Past experience has not confirmed that assumption, however need is still great and additional scholarship funds, perhaps at the Gateway entry point, are needed.

International students are largely unaware of honors programs since it is an American phenomenon, so all efforts there will be focused upon Gateway entrance.

- Academic Community Survey
An annual student survey is in progress to assess the diversity climate within Schreyer Honors College. The 2015 results will serve as the benchmark for future surveys. Feedback will be analyzed by the SHC Diversity Committee and relevant steps taken.
- Continue to collaborate, and where necessary develop closer ties, with PSU internal organizations for minority recruitment, including:
 - Community Recruitment Centers
 - Regional Admissions Representatives outside of PA
 - Multicultural representatives in other academic colleges
 - Bunton-Waller and Lenfest programs
- Northeast High School visit

- The Northeast visit was an initiative that came out of the Philadelphia mayor's office. The goal is to bring opportunities to inner-city students who do not typically have access to resources that other students may have. In coordination with the Philadelphia Community Recruitment Center (CRC), SHC representatives have visited Northeast each of the past two years. We meet with the top 25 seniors and top 50 juniors in this full day visit. The goal is to educate them about both Penn State and the SHC. We do a brief presentation with both groups and also conduct an essay workshop with the seniors. After just two years, this program has been very successful. Applications to the SHC have increased and two students were accepted for Fall 2014 (one student accepted the offer). We would like to duplicate this program with other schools in Philadelphia and Pittsburgh.
- Support from the Philadelphia and Pittsburgh campuses and CRCs
 - It is important to build relationships across the Penn State system in order to implement these types of programs. We have been making strides with these relationships and will continue to work on them. This event has minimal budget or staffing impact.
- Spend a Fall Day bus trip (November)
 - This program is hosted by Undergraduate Admissions and is aimed at URM students from Philadelphia, New York, New Jersey, and Baltimore/D.C. The students are required to have submitted a Penn State application by the time the event takes place, and there is also a GPA requirement. For the first time this year, the SHC was included at the information fair for these students. We will continue to attend this event.
- Achievers Weekend (late March/early April)
 - This program is hosted by Undergraduate Admissions and is aimed at URM students who have been accepted. They are invited to spend a night on campus, and their parents are also invited. We attempted to partner with them this year, but it was not executed. The main issue was the timing of the event compared to the timing of our offers being released. We will continue to look into partnering with Undergraduate Admissions on this program. The ultimate goal is to ensure Schreyer Honors College offers that fall within the URM students are invited to attend. This has minimal budget or staffing impact. The most important resource will be to effectively work with Undergraduate Admissions.

- Increased travel to more diverse areas
 - Within Pennsylvania, we would look at Philadelphia, Pittsburgh, and other small pockets.
 - Out-of-state, we should consider Southern Florida, Baltimore/D.C., Chicago, and various areas of Texas. We did have an increase of applicants from Puerto Rico this year, which may be another region to consider. *Please see the overall impacts of increased out-of-state travel for information on budget and staffing.*
- Open conversation to discuss a coordinated effort to recruit URM's.
 - Currently, assorted offices across campus initiate their own plans for recruiting minority students but we do not coordinate as a whole.

Achieving an out-of-state population of approximately 30% in the next five years is feasible. We have held steady at 22% in the past two years, and there are two main ways to increase this number:

- Increase out-of-state recruitment travel
 - The strongest response of out-of-state recruitment results from in-person visits. This type of travel also allows us to engage with parents and guidance counselors, which is equally as important. *See above impacts on budget and staffing.*
- Increase scholarships
 - Based on discussions with the Provost, increase number and award amounts of scholarships to help diversify the Schreyer student population. (OOS grant in aid)
- Increase social media presence as well as national visibility
 - As previously stated, we will support the coordinator of college relation's plan for social media. We will also assist in developing a plan to gain more national visibility.

Appendix 3: Communications Related Tactics Supporting Strategic Objectives: 1. Align with the University

7. Share the Schreyer Legacy

Research

- Based on audience priority
- Develop and execute general awareness survey to set baseline

- Increase Google rankings of SHC
- Create communications lifecycle of a Scholar from prospect to donor

Develop Target Audience Communications Plan

- Prospective Scholars and their parents
 - Cast a wider net to engage the top students who aren't applying.
 - Develop current student ambassador program to reach prospects, particularly in social media content generation.
 - Develop digital, social media and mobile strategy during decision phase
- Scholars
 - Develop current Scholar social media strategy
 - Brand each class through visual story-telling
 - Integrated Weekly Newsletter
- Faculty and staff
 - Build partnerships within University
 - Focus on relationship building with Undergraduate Admissions, University Marketing, Athletic Department, Alumni Association and social media team
 - Academic athletes honored at football game
 - Build consistent communications plan for SHC within University
 - Strategic articles featuring Scholars, faculty from all units
 - SHC as idea generator
 - Athletic Department: *Be the Difference* campaign
- Scholar parents
 - Parent newsletter
 - Parent social media awareness campaign
 - Host annual summer send-off parties in key districts
- High School Guidance Counselors
 - Develop strategic marketing campaign targeting guidance counselors to build awareness and increase engagement
 - SHC develop articles, find and join conversations
 - Create guidance counselor web page on shc.psu.edu
 - Research top guidance counselor organizations
 - Contact to see how we can become more of a presence
 - Work with admissions to geo-target three metro areas designated for growth

- Scholar Alumni
 - Create social media influencer team of key media alumni
 - Submit regular SHC articles to the Penn Stater
 - Awareness campaign to all PSAA chapters
- Donors and Friends
 - Execute athletic awareness campaign starting in August 2014
 - Development raise funds, Football IQ campaign at football games

Digital and Social Media Campaign

- Geo-target and profile specific campaigns
 - URMs, geographic location, area of study
- Define and execute social media strategy
 - Advertising budget will be necessary

Channel	Target Audience
Facebook	guidance counselors, Scholar families, young alumni, friends, donors
Twitter	current Scholars, prospective Scholars
Youtube	guidance counselor, prospective Scholars and parents
LinkedIn	current Scholars and young alumni, alumni
Instagram	current Scholars, prospective students
Mailchimp	all college communications
Flickr	all college communications

SHC re-brand

- Increase awareness and understanding of SHC
- Create brand guidelines

Ambassador programs

- Identify key ambassador groups
 - Staff, friends, parents, additional target audiences
 - Develop downloadable media and press kit

Awareness Campaign Timelines

Timeline	Action
Immediate	Quiet re-brand
6 months	Audience research
Year 1	Target audiences: guidance counselor, prospective Scholars and parents, current Scholars, Scholar parents
Year 2	Target audience: alumni
Year 3	Target audience: faculty and staff
Year 4	Target audience: donors and friends

Appendix 4: Development Related Tactics

Supporting Strategic Objective: **1. Aligning with the University**

- Work with colleagues in development offices to support and enhance honors education financial support via philanthropy (ongoing as of June 2014)
 - Continue to encourage college and campus colleagues to raise honors scholarships managed by their individual units
 - Continue to recruit liaisons for the development committee from key UP colleges.
 - No increase in budget anticipated at this time
- Work with the Office of Research Prospect Development to identify top SHC prospects (ongoing as of June 2014)
 - Every 6 months, refresh scoring of SHC prospects
 - Use information when traveling to allow for more efficient and effective trips
 - No increase in budget anticipated at this time
- Utilize new fundraising ideas to get younger alumni engaged (ongoing as of June 2014)
 - Utilize the DDAR crowd-funding platform, USEED, to increase support from younger alumni
 - Look at new ways to utilize email for younger alumni
 - Investigate how social media can play a role within fundraising and implement with the help of SHC Communications Office
 - No increase in budget anticipated at this time
- Partner with the Scholar Alumni Society and Schreyer Parents Council to help with recruiting (ongoing as of June 2014)
 - No increase in budget anticipated at this time

Supporting Strategic Objective: **2. Build Diversity**

- Increase scholarships for those with financial need (ongoing as of June 2014)
 - No increase in budget anticipated at this time
- Increase scholarships from geographic areas that are targeted for recruitment (ongoing as of June 2014)
 - No increase in budget anticipated at this time

- Create campaigns around scholarship need to build momentum towards a stated fundraising goal (by December 2014)
 - No increase in budget anticipated at this time

Supporting Strategic Objective: 3. Enhance Academics

- Support via development and fundraising efforts as needed (ongoing as of June 2014). No increase in budget anticipated at this time.

Supporting Strategic Objective: 4. Promote Knowledge Creation

- Support via development and fundraising efforts as needed (ongoing as of June 2014). No increase in budget anticipated at this time.

Supporting Strategic Objective: 5. Shape Leaders

- Partner with the Scholar Alumni Society to identify scholar alumni that have interesting and noteworthy leadership lessons to share with current scholars (by December 2014). No increase in budget anticipated at this time.
- Support via development and fundraising efforts as needed (ongoing as of June 2014). No increase in budget anticipated at this time.

Supporting Strategic Objective: 6. Launch Careers

- Partner with the Scholar Alumni Society and Schreyer Parents Council to help scholars with internships, graduate school admission and full-time employment (ongoing as of June 2014). No increase in budget anticipated at this time.

Supporting Strategic Objective: 7. Share the Schreyer Legacy

- Align development messaging with SHC message and themes (ongoing as of June 2014)
 - Cost of mail chimp email application service
- Work with SHC Communications Office to build awareness amongst not only SHC alumni/parents but also the general Penn State alumni community (ongoing as of June 2014)
 - Cost of mail chimp email application service
- Partner with the Scholar Alumni Society and Schreyer Parents Council to help with recruiting (ongoing as of June 2014)

- Work with SHC IT Team to create a program to track alumni/parent engagement at different SHC sponsored events
 - No increase in budget anticipated at this time since database will be built in-house
- Create campaigns around scholarship need to build momentum towards a stated fundraising goal (by December 2014). No increase in budget anticipated at this time.

Appendix 5: Academic Affairs Related Tactics

Supporting Strategic Objective: 1. Align with the University

The two curriculum clusters that would be impacted by a 10-25% larger first-year class are Math/Science and Business. For everything else, students are spread over a wide range of courses (Liberal Arts) or their numbers are too small, even with the proposed increase, to be significant (e.g. Architecture). Every new Scholar would be one more person for ENGL/CAS 137H/138T, but that should be resource-neutral since each new SHC admit is one fewer student in ENGL 30/CAS 100 and Scholar demand for those courses is less than Paterno Fellows aspirant demand.

Below are listed the Fall 2013/Spring 2014 enrollments for several math/science classes:

BIOL 110H: 19 in one section, 9 in the other (both Fall)
 BIOL 220M and BIOL 240M: 9 in each one (both Spring)
 CHEM 110H: 13 in one section, 12 in the other (both Fall)
 CHEM 112H: 21 in the only section (Spring)
 MATH 140H: 20 in one section, 6 in the other (both Fall)
 MATH 141H: 20 in one section, 7 in the other (Fall); 20 in one section, 4 in the other (Spring)
 MATH 220H: 15 in the Fall section, 16 in the Spring
 MATH 251H: 13 in the Spring
 PHYS 211H: 17 in the Fall
 PHYS 212H: 14 in the Spring

Math/Science

In most cases, the courses *could* accommodate more first-year students, but only if they were controlled to prevent *continuing* students from taking them, including continuing Scholars during their own priority registration. Based on the above numbers, CHEM 112H and PHYS 211H are the top priorities for additional sections to accommodate an increase of first-year Scholars, followed by the 200-level Math courses. Even though the numbers may not look high, second-year students typically seek those courses so the first-year student numbers above suggest that additional new Scholars would create enrollment pressures.

Business

All Smeal College of Business first-year Scholars are expected to take the same course, currently MGMT 301H in the fall and ACCTG 211H in the spring. Between Smeal and Smeal-inclined DUS Scholars (who by

policy have equal access to Smeal classes), those classes are already beyond capacity, 30 and 26 respectively.

Smeal would need to create new sections of these courses or change what Scholars are expected to do (and when), to accommodate the projected number of new business students that would come from a 25% increase in the SHC incoming class. This would be the case for the second-year FIN 301H and MKTG 301H as well, since the students are still in a cohort for that year unlike in the Math and Science courses where they disperse or don't continue in a given subject.

Projected costs to add more courses to cover additional students:

- The SHC currently compensates colleges for lower-division general education courses at the rate of \$1700 per credit. If this model were applied to additional honors course offerings as described above, Science would receive \$23,800 (CHEM 112H, PHYS 211H, MATH 220H and 251H) while Business would receive \$20,400 (MGMT 301H, FIN 301H, MKTG 301H, ACTG 211H).
- After the first year (or, in Smeal, after the second year) students are dispersed among majors so a 25% increase in Scholar numbers would likely not create the need for additional courses in most departments. However, in some departments (e.g., Finance, Biology, BMB and Psychology) any increase in the number of thesis writers would strain the faculty's capacity to supervise thesis work.
- The Academic Affairs office along with SHC's Career Development office awarded approximately \$350,000 to students in 2013-14 to pursue international, research, and internship opportunities. (This amount excludes programmatic funding not primarily disbursed directly to students.) These funds are already severely strained to meet legitimate student requests, so a 25% increase in the first-year class, which (assuming steady Gateway and Paterno Fellows entrance to the program) means an approximately 15% increase in the overall size of the SHC. This suggests the need for an additional \$50,000 to maintain the SHC's ability to fund Scholars in these activities.

Supporting Strategic Objective: 3. Enhance Academics
Improving the Advising Structure to Better Serve Growing Number of Scholars

Currently several University Park (UP) academic colleges have formally or informally designated lead honors advisers, similar to the honors coordinator roles at other campuses. The quality and uniformity of honors advising is positively impacted by this model, which we propose to extend to all University Park colleges. (Note that all campuses outside UP already have this model—the “Honors Coordinator.”) In the College of Liberal Arts and Eberly College of Science, which have both large numbers of Scholars and a very wide range of departments, we propose two lead advisers: In Liberal Arts, one for humanities and one for social sciences and in Eberly College of Science, one for life sciences and one for natural sciences and mathematics/statistics. Engineering, while the largest college in terms of number of Scholars, would have one lead adviser given the lack of a clear dividing line as in the other two colleges.

The service model would continue to be used to reward faculty advisers. We do, however believe that the lead honors advisor should be identified by the title Schreyer Honors College Lead Advisor on the website, receive appropriate service recognition for this function and be the point person who is expected to disseminate honors college updates to the honors faculty.

The colleges with **formal** lead faculty or administrators are:

- Business
- Communications
- Education
- Nursing

The ones with **informal** lead people:

- HHD
- IST

The colleges to appoint lead advisers include:

- Arts and Architecture
- Agricultural Sciences
- DUS
- EMS
- Engineering
- Liberal Arts
- Science

Institute an annual SHC Honors Advising and Teaching (HAT) Conference

The purpose of the conference is to engage Schreyer Honors College Faculty and Advisers in best practices and new developments in advising and teaching with the goal of creating a strong connection and communication, resulting in ongoing improvement and excellence.

Estimated lunch costs of an honors advising conference:

- Nittany Lion Inn
 - 70 people, \$50 per person at \$3500
- HUB, with University Food Services or an outside caterer
 - 70 people, \$30 per person for \$2100

Measure improvement with ongoing annual assessments from students and faculty

The academic team will continue an annual assessment of email withdrawals from the honors college to determine reasons why students leave the college and what measures, if any, need to be taken to address them. The academic team will:

- conduct annual focus studies with exiting seniors to address issues including: advising effectiveness, course quality, teaching effectiveness and the overall Schreyer Honors College experience.
- routinely assess honors course syllabi for evidence of mission and honors rigor.
- routinely assess honors option procedures for evidence of mission and honors rigor.
- measure other outcomes that represent strong preparation (e.g., number of students completing Schreyer requirements and graduating with honors).

Establish “best practices” model to engage the colleges by completing the thesis writing program with all twelve Colleges, including:

- Thesis boot camps
- Thesis guides on department websites
- 494H Thesis Research course uniform throughout the university provide template to colleges
- Utilize graduate school students to teach discipline specific thesis writing workshops
- Offer thesis “best practice education” through blog posts, posters, face to face communication and social media.

**Supporting Strategic Objective: 4. Promote
Knowledge Creation
*ROAR (Recording Of Academic Research)***

- Require Scholars to make a presentation of their research if they receive any funding support. This could take place at the Undergraduate Research Exhibition, at the department level, or at an international, national or statewide academic conference.
- Utilization of digital technology to record student presentations and encourage all graduating scholars to make an electronic recording of their research.

- Archiving evidence of published scholarship and tracking those publications.
 - This bibliography would be posted on the SHC web site and kept as a record of our Scholars' published works.
- Require blogging reports for each of our major global initiatives (India and South America) as a way to report back to the public the group's travel experiences.
- Encourage Scholars to consider a career in the academy by funding a limited amount of Scholars who wish to attend conferences, even if they are not presenting research.

Supporting Strategic Objective: 5. Shape Leaders ***Leadership Lessons***

- A new course offering, will present Scholars with a leadership course that draws upon the leadership lessons of alumni and friends of the honors college. Utilizing digital technology to create a library of leadership lessons will create greater reach for the courses. This will be in addition to the long-standing "Leadership Jumpstart" course.
- We will explore digital technologies that will allow us to create an online library of alumni leaders to expand the reach of leadership programs within the honors college.
- Leadership training will address comprehensive development of Scholars and explore factors related to life quality that go beyond classroom performance.
- Pilot digital delivery of leadership events/programs to provide access to more Scholars including those at other campuses. The pilot may leverage the World Campus.

Appendix 6: Student Programming Related Tactics

Supporting Strategic Objectives: 3. Enhance Academics

4. Promote Knowledge Creation

5. Shape Leaders

The Shaping the Future Summit was piloted in 2013-14 and 2014-15. The Summit is designed to engage the Penn State community in discussion and interactive programs focused on global issues and leadership scenarios in the next decade. The Summit culminates with an internationally distinguished speaker who will address the university community and bring national attention to the topic and Penn State's efforts in the area.

These pilot years have been very successful. The Shaping the Future Summit brings together faculty, alumni, students, staff, and community members around a single major topic. In the first year the theme was "The Impact of Innovation" and in 2014-15 it was "The Power of Money." The topics are chosen for their relevance to current and future societal issues and to allow a variety of perspectives to be considered. The Summit also showcases the way in which Penn State is able to and already is addressing these pressing issues of global importance. Most importantly it enables us to "shape people who will shape the world" as it presents to them *today* they challenges that they will be required to answer *tomorrow*.

The Summit has been widely considered a success, yet in order to continue a minimum of \$200,000 per year will need to be secured.

Examples of Summit Programming:

- **Honors courses and public events that encourage an interdisciplinary, multi-faceted approach to the Summit's topic:** As one of the nation's leading public research universities, Penn State is home to cutting-edge initiatives in fields as diverse as homeland security and sustainability. The Schreyer Honors College will work with academic departments to plan honors courses, additional lectures and symposia, and other programming that crosses traditional academic boundaries to examine the interconnectedness of financial, social, environmental, and individual well-being.
- **Special study abroad and research opportunities centered on Summit topics:** Experiences beyond our campus are

increasingly important aspects of a Schreyer Honors College education, and the Summit can give these opportunities even greater meaning and impact. During the 2015 Summit on the Power of Money, for example, faculty may choose to lead trips that give students firsthand knowledge of international economic development programs or that connect our undergraduates with financial leaders on Wall Street and in Washington, D.C.

- **An essay/policy paper competition for Schreyer Honors Scholars:** Our students will be invited to submit papers, developed within and outside of their coursework, that address the topic of the Summit. The authors of the best entries, as chosen by a panel of students and faculty, will be invited to present their work in a panel at the Summit, and the papers will be published online.

The culmination will be a high-profile week of events, structured around the keynote address but designed to showcase the views and achievements of Schreyer Scholars as well. The week of the **2015 Shaping the Future Summit** will also include:

- **The Shaping the Future Distinguished Lecture:** The speaker chosen with input from our students and the summit planning committee will be asked to present not only his or her views on the current state of the global economy, but also predictions about what challenges and opportunities that money will present to our students and the world over the coming decade and beyond.
- **Additional speakers chosen from the Penn State faculty:** A planning committee of students, faculty, and administrators will be asked to select students and scientists who can offer important perspectives from their own disciplines on money's role in fields ranging from health care to the humanities, scientific innovations to national security.
- **A panel of Schreyer Scholars who will present their own solutions to the issues raised by the Summit:** Chosen through the essay/policy paper competition described above, this group of students will have an opportunity to debut their ideas on the national stage at the Summit.
- **Additional private events for Schreyer Scholars:** While the public and the media will be invited to the above events during the Summit, it is also important for our students to have the opportunity to interact in smaller group settings, such as receptions and seminars, with our keynote speaker and the Penn State faculty who present at the Summit.
- **An online archive:** Even after the year of programming and the Summit weekend have concluded, the impact of the program will

be extended through the ***Shaping the Future*** website, offering access to the keynote address, faculty and student presentations, and tools for other institutions to initiate dialogue in their own academic communities.

A committee of honors students, faculty, and staff guides the Summit, selecting the theme and recommending speakers and events. Schreyer Scholars are key leaders in the development of the Summit and this provides them with the experience of planning and executing a year's worth of programming. Whether identifying speakers, booking locations, or running marketing campaigns, these experiences allow Schreyer Scholars to grow as individuals. This experience will also teach them lessons they will draw upon in their professional careers for years to come.

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