

2018-19 MICU Goals - Annotated

This document outlines the 2018-2019 goals for Michigan Independent Colleges & Universities (MICU) and our progress towards the goals this year. These goals are based on the MICU five-year strategic plan and annual goals carried over each year.

A. Strategic Plan Goal 1: Maintain and Increase State Funding for Student Financial Aid

Sustain and expand state financial aid funding for students at Michigan's private, independent, nonprofit higher education institutions, and advocate for additional increases in student financial aid generally. This includes the Michigan Tuition Grant, as well as other financial aid programs that make higher education more accessible for students.

1. Actively advocate on behalf of a stronger Michigan Tuition Grant program. (*Strategy 2*)
 - a. Goal: Increase funding for the Michigan Tuition Grant by at least the same percentage as appropriations increases for Michigan's public universities.
 - b. Success Metric: Increase in appropriations and/or grant funding amount.

Update: Because new governors are afforded additional time to submit budget recommendations, the process has not moved very far this year. In a normal year, not only would we have the Governor's recommendation by now but one or both legislative branch responses. As a result of the extra time, we only have the Governor's recommendation so far.

It had been anticipated that Governor Whitmer would eliminate funding for current student aid programs, including the Tuition Grant, and re-direct the funding to a new program she announced in her State of the State address, the Michigan Opportunity Scholarship. The new program would provide "free" community college for all recent high school graduates. MICU aggressively pushed back on the proposal and, as a result, the Governor announced she is delaying her proposal until the 2021 budget cycle and kept our funding intact for the upcoming budget.

Obviously, we are pleased with the retreat but we are also seeking an increase in funding for the Tuition Grant from the legislature. We are asking for funds that will enable us to raise the per pupil grant by \$100 to \$200 for a total of either \$2,500 or \$2,600.

2. Use data to inform and strengthen advocacy efforts. (*Strategy 1*)
 - a. Goal: Engage with policymakers on multiple levels including social media, direct outreach, and regular informational briefings. This includes:
 - i. Continuing the Independent indicators bi-weekly email
 - ii. Add bi-weekly profile of institutions: one institution profile per bi-week

- b. *Success Metrics: Maintain strong open and share rates of all communications including legislative emails, one-pagers, reports, and other data.*

Update: Independent Indicators continues to have a strong following with a 40%-50% open rate for both the legislature and staff. Our one-pagers and research briefs are gaining traction as we hear data parroted back to us. Some of our research pieces have not been as successful (college vs. car) and we are working on why that is the case. With a new legislature in January 2019, we have to work from the ground up to create awareness of our members and our issues. Thus far, they have been receptive.

B. Strategic Plan Goal 2: Strengthen the Profile of Private, Independent, Nonprofit Higher Education

Increase positive awareness and opportunities for direct engagement among policymakers and opinion leaders regarding the value and impact of MICU member colleges and universities.

1. Actively engage board members in representing MICU concerns in Lansing and Washington, D.C. (*Strategy 2*)
 - a. Goal: Better coordinate legislative meetings for members on campus, in Lansing, and in Washington, D.C.
Goal: Help to enhance relationships between MICU member presidents, the legislature, and congress
 - b. *Success Metrics: Increased participation by member presidents in legislative and congressional meetings; increased contact with legislature and congress*

Update: We had a successful trip in February 2019 for NAICU Advocacy Day. We coordinated meetings with seven members of Congress from Michigan including: Haley M. Stevens, John Moolenaar, Tim Walberg, Debbie, Dan Kildee, Gary Peters, and Debbie Stabenow. Seven member presidents joined us for the day of meetings. We are planning a training workshop for congressional staff on higher education issues. In Lansing, we continue to coordinate meetings between the appropriations committee members and House and Senate Leadership for MICU and our member institutions.

Since January, we have met with all four committee chairs and each member of the appropriations committees as well as multiple meeting with the Governor's budget director and his staff. We are arranging similar meetings with leadership in both chambers and the Governor's executive team.

2. Improve and strengthen participation and activities for "Independent Colleges Advocacy Day" to include MICU presidents, students, and board members from member colleges and universities during Fall 2018. (*Strategies 2 and 4*)
 - c. Goal: Participation by 20 of the 25-member institutions and extend participation to include institution mascots as a better draw for legislators.
 - d. *Success Metric: Increased participation by member institutions and legislature*

Update: Institution participation increased from the 2017 Advocacy Day with 22 institutions up from 19. We saw a decline in individuals who participated from 165 down to 86. This drop is likely due to a decline in presidents and senior staff (in 2017 the Advocacy Day also included a summit with the Governor). We also saw a decline in students, as the date was a bit too early in the fall for many students to sign up and prepare.

Participation statistics:

86 attendees: 8 Presidents, 7 Campus Presidents, 11 Admissions, seven communications/PR, two Financial Aid, 32 Other (Registrar, Advancement Office), 14 students, and five Student Services Representatives. Of the 26 MICU members (member added after goal established), there was participation by four mascots-Hope College, Calvin College, Davenport University, Madonna, and Siena Heights University. Overall, participation by 22 out of our 26 members.

MICU members met with 47 representatives and senators in individual and personal meetings. We also held a House Higher Education Appropriations Subcommittee meeting where presidents, students, and partners provided testimony about the value of student financial programming in Michigan. Additionally, we had the legislature issue a proclamation naming the day and week “Independent Colleges Day/Week.” Lastly, we also added mascots to Advocacy Day creating attention and increased interest from the legislature.

3. Grow Strategic Alliances (*Strategy 4*)

- a. Goals: Enhance alliances with statewide stakeholders such as the Michigan Association of State Universities and the Michigan Community Colleges Association Michigan College Access Network as well as state agencies including the Michigan Department of Treasury, the Center for Education Performance & Information, and Talent and Economic Development.
- b. Goal: Collaborate with Michigan Association of State Universities and Michigan Community Colleges Association to co-lead and facilitate transfer credit mapping and programming in Michigan.
- c. *Success Metrics: Enhanced partnerships with other organizations through strategic programs, projects, and events*

Update: During the past year, MICU has worked to enhance collaboration and partnerships with several organizations. With the Michigan Association of State Universities (MASU), MICU staff has worked closely to do joint presentations at conferences and host a Legislative Roundtable (see Goal 6 in this section). Our partnership with MASU also includes work opposing community college 4-year degree authority and advocacy for additional student financial aid. MICU has also expanded its collaboration with Michigan College Access Network (MCAN) through regular meeting with staff and inclusion in MCAN publications for high school students. This year MICU is publishing a college guide of independent institutions in Michigan to be distributed

to college counselors across the state. MCAN is collaborating with us to print and distribute the guide. We also continue to support the Advise Michigan program. MICU's collaborations with CEPI continues as we plan additional training for MICU members to enter the p-20 state data system.

4. Use quantitative and qualitative data to identify the unique contributions of MICU members compared with their competitors. (*Strategy 1*)
 - a. Goal: Release and/or update the following publications
 - i. Capital Expenditures Report
 - ii. Students at-a-glance for MICU as a whole and individual institutions
 - iii. Veterans brief/report
 - iv. Collaboration report
 - v. Year-in-Review Report
 - vi. Financial Aid metrics at-a-glance
 - b. *Success Metrics: Successful report releases with strong press response and legislative response*

Update: MICU will release the capital investment report "Private Capital, Public Purpose - Capital Investments made by Michigan's Independent Colleges & Universities" in March 2019. Students At-A-Glance documents were updated along with the collaboration report (in partnership with Michigan Association of State Universities). The veteran's brief will be updated and released for Veteran's Day in November 2019. MICU released a briefing document, "Investment Comparison: College versus Car?" in June 2018 and released a year-in-review metrics report in September 2018. These, in addition to our other data reports, have contributed to MICU's advocacy efforts and overall positive awareness building campaign for independent higher education in Michigan.

5. Develop and grow the independent colleges caucus within the Michigan legislature (*Strategy 2*)
 - a. *Success Metrics: Host first meeting of the caucus and define set of values for caucus to maintain.*

Update: We continue our planning efforts to create a new caucus and are working with the new legislature to develop interest. With almost 70% turnover in the legislature in January our efforts have been slowed.

6. Plan and implement a "Higher Education Boot Camp" for new Michigan legislators in January/February 2019 (*Strategy 2*)
 - a. *Success Metrics: Co-host event with other higher education associations for new legislators.*

Update: In February 2019, MICU co-hosted "Michigan Higher Education Roundtable" with Michigan Association of State Universities for the legislature and staff. This event was

attended by 27 legislators and staff and allowed both sectors of higher education in the state to provide an overview of higher education, the importance of bachelor's degrees, and state financial aid in the state.

C. Strategic Plan Goal 3: Provide High-Value Member Services

Provide high-value member benefits and other services to MICU institutions, which will also fund MICU's expanded advocacy and operations.

1. Monitor draft legislation that will have an effect on MICU members and advocate on behalf of MICU members' concerns. (*Strategies 2 and 4*)
 - b. Goal: Keep members informed of policy and legislation that affects their operations and students.
 - c. Goal: Add macro-level legislative update for MICU member presidents
 - d. *Success Metrics: Continue to have positive outcomes for legislation that affects MICU members*

Update: MICU sends regular email communications to MICU member presidents to ensure they are up-to-date on any legislation that may affect independent colleges. In February, MICU started sending bi-weekly legislative updates to member presidents to provide a high-level update of all legislative action in the state.

The lame-duck period at the end of the legislative cycle is always challenging. This past year a proposal to revamp teacher-prep requirements was briefly revived after we successfully killed off the proposal earlier in the year. In the end, we successfully killed it off again. The legislative sponsor was herself termed out at the end of the year so we do not anticipate the bills to be reintroduced.

2. Continue the implementation of the five-year strategic plan (*Strategies 1-4*)
 - a. Goal: Monitor progress with measureable metrics, determine appropriate level of and types of services, along with appropriate staffing and funding for the organization.
 - b. *Success Metrics: Operate MICU in alignment with strategic plan and utilize review metrics as defined in the plan for evaluation*

Update: MICU contracted with Public Policy Associates to conduct president interviews as part of the strategic planning evaluation process. MICU staff created an evaluation matrix as well with each of the goals and a "traffic light" color-coding system to indicate progress on each goal. Notes are included with the matrix where resources are not sufficient for the association to address some of the goals.

3. Maintain current member services and gain member participation in each service.
(Strategy 3)

Goal: Add additional members into current services.

Goal: Explore state licensure for self-insured property/casualty program.

a. *Success Metrics: Increase member participation in and satisfaction with member service programs.*

Update: This year MICU’s Director of Member Services was able to meet with members and build relationships as she was on-boarded in late March 2018. Updates for each program are below:

- Workers’ Compensation Fund: 16 members currently participate and two additional members are submitting/have submitted applications.
- LTD/Life: Seven members currently participate and one additional member completed an application but is unlikely to join due to a low savings rate for them.
- Property/Casualty: Six institutions currently participate. Several members are submitting applications as we created a more structured format for requesting and submitting materials.
- ScholarBuys: Twelve members participate and one additional member joined to add Microsoft products and two added Adobe products.
- BoardBook: Two members participate but we added no new accounts.
- Campus Logic: Seven members participate and two members added additional modules.
- P-Card: No new accounts.
- Purchasing Platform: No new accounts.

Current participation includes:

WCF	LTD/Life	Property/Casualty	Microsoft	Adobe	BoardBook	MEP - 403b	CampusLogic	p-card	Purchasing Platform
16	7	6	12	10	2	4	7	0	0

4. Implement additional member service programs that will provide benefits to members while growing non-dues revenue for MICU operations. (Strategy 3)

a. Goal: Launch multiple employer pension plan, purchasing card, and purchasing portal.

b. *Success Metrics: Successful launch of new programs with strong member participation.*

Update: To assist member institutions with reducing retirement plan administrative costs and reduce fiduciary liability, MICU developed a 403(b) Multiple Employer Pension plan. MICU initiated a data collection survey to gauge the interest of members and the feasibility of moving forward. Once we determined we had both interest and the feasibility, we held an in-depth training where members learned more about the

program. After the training, a MEP working group of five member institutions was established to review MEP participation agreements and establish a governance structure. The Working Group has now transitioned to the MEP Board. Two members (Alma College and Adrian College) will likely launch their participation this summer and fall and two other members (Northwood University and Walsh College) will likely launch in early 2020. Communication is ongoing to members who have participated in the data survey but were not part of the Working Group encouraging them to join the MEP. The purchasing card and purchasing portal have been launched; however, have not yet seen much interest from members.

We are currently investigating additional member services that include a cyber security product, vendor consolidations of campus services, and job posting software for Career Services offices.

5. Strengthen role-alike working groups of MICU members to share best practices and consider opportunities for collaboration while looking to add additional role-alike groups. (*Strategy 3*)
 - a. Goal: Continue existing working groups and add group for Chief Financial Officers.
 - b. *Success Metrics: Successful launch of new work groups and continued strong participation and satisfaction with existing groups.*

Update: MICU added a financial aid working group that met in October 2018. The Institutional Research/Institutional Effectiveness Group continues to meet as does the Marketing/Communications/PR working group. The CFO working group has not moved forward yet as the MICU team is researching methods/formats used by other states. MICU also plans to add working groups this year for Title IX coordinators and compliance staff.