

SOFIA UNIVERSITY

STRATEGIC PLAN UPDATE

AN UPDATE ON PROGRESS RELATIVE TO THE STRATEGIC PLAN 2019-2023

Office of the President
MARCH 2021

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Introduction

The Strategic Plan Update document presents the most current update to Sofia University's 2019 Strategic Plan. The original Plan, which spans a four-year period from 2019-2023, provides Sofia University with a roadmap of strategic directions, identifying areas of emphasis with corresponding strategies to "raise the bar" in the institution's quest for excellence and accountability. This Strategic Plan Update responds to the Five Strategic Goals from the original Plan: Academic Excellence, Academic Infrastructure and Technology, Enrollment Management, Financial Sustainability, and Student Services: "*One university, Two Campuses.*"

Each of the Five Strategic Goals is supported with articulated actions and outcomes, the status of which is captured in the templates on the following pages. In essence, the Update provides not only the latest accounting of progress related to each action, but also a workplan that will coordinate efforts and create alignment across the institution as it strives to achieve identified targets. It forms the baseline upon which future directions will be calibrated and measured.

The Strategic Plan Update document presents highlights of outcomes and activities in all five areas. For a comprehensive review of all actions identified up until 2021, please refer to the attached *Appendix A*.

Concomitant to the Strategic Plan, the President provides, on an annual basis, Strategic Directions that are approved by the Board of Trustees. These Directions are developed in alignment with the Five Strategic Goals of the Plan and form the basis of the President's work which is reviewed annually. This alignment is represented in the following pages of this document.

Overall, the Strategic Plan Update demonstrates that Sofia University has made progress in many areas in the last two years despite some significant challenges, including administrative, financial, and a dynamic market in addition to the impacts attributed to the COVID-19 pandemic. The Update process has, in addition, identified gaps and opportunities while remaining accountable through timelines and commitments to completed outcomes. The comprehensive report on activities related to strategies in *Appendix A* reveals a good news story, in that much work has been undertaken and achieved with the understanding that more can and will be accomplished. Most importantly, the Sofia community has come together to work collaboratively in this exciting and rewarding process that will ensure a strong and healthy future for the University.

Sofia University's Vision, Mission, Values

Vision

Sofia University aspires to be a globally conscious leader in transformative education and, thus, empower students with intellectual growth, ethical reasoning, and the development of emotional intelligence.

Mission

Sofia University is a passionate, dynamic learning community that fosters multiple ways of knowing. We are dedicated to academic excellence with a shared commitment to authenticity, inclusivity, cultural humility, ecological stewardship, and service to others. Our curricula focus in six areas of inquiry: **the intellectual, emotional, spiritual, physical, social, and creative aspects of life.**

Core Values

Service; Stewardship; Transformation; Academic Excellence; Cultural Humility; Innovation; Inspiration; Emotional Awareness and Commitment

Five Strategic Goals and President's Strategic Directions

Five Strategic Goals	President's Strategic Directions
Academic Excellence	1. <i>Financial viability</i>
Academic Infrastructure and Technology	2. <i>Academic quality and credibility</i>
Enrollment Management	3. <i>Innovative, relevant, competitive, demand- based academic programing</i>
Financial Sustainability	4. <i>Marketing and recruitment for 2020 and beyond</i>
Student Services: One University, Two Campuses	5. <i>Regulatory accreditation and Compliance</i>
	6. <i>Promotion of a renewed culture in the workplace</i>

ACADEMIC EXCELLENCE

Academic quality and credibility (2)
Innovative, relevant, competitive, demand-based academic programming (3)
Regulatory and Accreditation Compliance (5)

ACADEMIC INFRASTRUCTURE and TECHNOLOGY

Innovative, relevant, demand-based academic programming (3)
Regulatory and accreditation compliance (5)
Promote a renewed culture in the workplace (6)

ENROLLMENT MANAGEMENT

Marketing and Recruitment for 2020 and beyond (4)
Innovative, relevant, competitive, demand-based academic programs (3)

FINANCIAL SUSTAINABILITY

Financial viability (1)
Regulatory and accreditation compliance (5)
Innovative, relevant, competitive, demand-based academic programming (3)
Promote a renewed culture in the workplace (6)

STUDENT SERVICES: ONE UNIVERSITY, TWO CAMPUSES

Promote a renewed culture in the workplace (6)
Innovative, relevant, competitive, demand-based academic programming (3)
Global College (4)

The President's annual Strategic Directions are in alignment with the Strategic Plan's Five Strategic Goals.

ACADEMIC EXCELLENCE

Academic Excellence

The delivery of transformative education is at the core of Sofia's mission, focusing on intellectual growth, ethics, and the development of emotional intelligence. The University is committed to delivering programs of the highest possible quality. In support of this commitment the following activities highlight some of the outcomes that have been developed in alignment with strategies identified in the Strategic Plan. For a comprehensive update on additional strategies please refer to *Appendix A*.

- The creation of Sofia University's a **Center for Excellence in Teaching and Learning** (CETL) is a game-changer that will bring together all instructional and research support under one roof. The center will support faculty technological, pedagogical training and onboarding, the online writing lab, dissertation office, syllabi development, and repositories for research in transpersonal psychology, as well as support research, academic presentations, and publications. The CETL will become the central hub for all teaching and research activities at Sofia. The Center will be completely up and running by June 2021.
- The development of standardized residential and online templates supports complete and effective use of the online campus in the Canvas Learning Management System (LMS). The residential template provides the instructor with administrative support (e.g., gradebook, assignments, student work, feedback, required materials, supplementary materials etc.) while providing convenience and transparency for the student. The online template will lay out the more detailed elements required for a fully online course. Standardized templates create consistency in course structure and ease of use for the instructors. In addition, proper use of the LMS provides the foundation for accurately and efficiently extracting data for assessment purposes.
- Sofia is in the process of embarking on a cycle of Program Reviews which will provide external validation, accountability, and rigor for all programs. Three program reviews will be conducted this year, MBA, PhD and PsyD. A specialist has been retained to drive the process and with the input of faculty, write the self-study report and, following the external reviews, the implementation and application report. These reviews will be used to evaluate programs, faculty, and future initiatives.
- Institutional Learning Outcomes at all three levels (Institutional, Program, Course) are in the process of being reviewed and revised. Outcomes will be properly mapped and applied consistently across the University. This will result in better institutional alignment and accountability, as well as more precisely define expectations and enhance academic quality.
- The creation of an Academic Master Plan, in alignment with the Strategic Plan, will set annual academic goals, build on opportunities and trends, and focus faculty and staff on academic excellence. A first for Sofia, the Academic Plan will be completed by September 2021.

STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.1 Faculty

Strategy 1.1.4 Provide opportunities and processes for Faculty development and support.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Provide supports for faculty to enhance teaching effectiveness. The development of a new Centre of Excellence for Teaching and Learning (CETL) will form the nexus of support and teaching effectiveness for faculty.</i>	Creation of a Center of Excellence for Teaching and Learning.	Center operational and services the Sofia community	Provost/Program Chairs/Center Director	In Progress with an anticipated completion date of June 2021	Current Director of the Dissertation Office will assume role as the Director of the new center. The Center currently encompasses all Canvas and technical training, writing lab, dissertation support center, syllabi development, instructional support materials, and Dr. Frager's repository for research in transpersonal psychology project.
	Timeline: June 1, 2021				
<i>As part of the CETL, an online Teaching and Learning support service initiative will be created.</i>	All faculty engage in technical and other training developed in the Center and make use of research materials. A report on completion of faculty training and data on Center resource usage will be created.	All faculty go through mandatory training and make use of the substantive resources in the Center	Provost/Director of IT	In Progress with an anticipated completion date of December 2021	
	Timeline: December 2021				
<i>As part of the CETL, a review of</i>	A review of online training options will be	Completed review.	Director of IT	In Progress with an anticipated	

<p><i>online training options keeps us abreast of important trends and best practices and provides accessible support for faculty.</i></p>	<p>created to ensure that Sofia has the technology support needed for delivering its programs.</p> <p>Timeline: December 2021</p>	<p>Every two years a technology-use and review undertaken</p>		<p>completion date of December 2021</p>	
<p><i>Develop faculty onboarding and training courses for instructional use of Canvas LMS.</i></p>	<p>Develop training onboarding programs.</p> <p>Timeline: December 2021</p>	<p>Training and onboarding completed with participation by all new faculty</p>	<p>Provost/Director IT</p>	<p>In progress with an anticipated completion date of December 2021</p>	<p>Design phase has commenced.</p> <p>IT and AVP are in the process of building a faculty on-boarding course in Canvas.</p>
<p><i>Standardization of course templates provide consistency, in teaching across the institution.</i></p>	<p>Course master templates created for teaching faculty use, in every program.</p> <p>Timeline: December 2021</p>	<p>Completion of master templates which are used for all courses</p>	<p>Provost/IT</p>	<p>In Progress with an anticipated completion date of December 2021</p>	<p>Templates completed for BSBA/BAP MBA/MSCS/MBAO/MATPO</p> <p>Note: BSBA is a "Residential" template</p>

STRATEGIC GOAL: ACADEMIC EXCELLENCE Academic Oversight and Management

Strategy 1.4.6 Regular curriculum review, and the development/ implementation of Learning Outcomes, provide rigor, set clear learning objectives, and enhance academic quality.

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>Learning Outcomes provide institutional alignment, accountability, define expectations and enhance academic quality.</i></p>	<p>Learning outcomes are developed at the Institutional (ILO), Program (PLO) and Course (CLO) level.</p> <p>Timeline: ILOs completed; June 2021 for PLOs; December 2021 for CLOs</p>	<p>Learning outcomes at all three levels are developed, implemented, and reviewed regularly.</p>	<p>Provost, Office of Institutional Research, Program Chairs</p>	<p>Completed: Institutional Learning Outcomes</p>	<p>A faculty team led by the Provost revised the ILOs, with the new version approved by the Board in September 2020.</p>
				<p>In Progress: Revision of Program Learning Outcomes with an anticipated completion date of June 2021</p>	<p>A consultant was hired to work with each Program Chair to do a detailed mapping of PLOs to ILOs. This mapping process showed the need for revision of PLOs for most programs. This revision is underway.</p>
				<p>In Progress: Course Learning Outcomes with an anticipated completion date of December 2021</p>	<p>After this is complete all CLOs will be mapped to the PLOs and evaluated.</p>

STRATEGIC GOAL: ACADEMIC EXCELLENCE Academic Oversight and Management

Strategy 1.4.7 The development of a cycle of Program Reviews provides rigor, external validation and enhances academic excellence

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>Program Review process provides rigor, external assessment, validation, and enhances academic quality.</i></p> <p><i>An annual internal review will be undertaken in addition to an external review every five years.</i></p>	<p>A standardized process and rotating schedule of Program Reviews will be developed on a five-year cycle.</p> <p>Timeline: July 2021</p> <p>A template for internal and external reviews will be developed and approved by the BOT Academic and Student Affairs Committee.</p> <p>Timeline: December 2020</p>	<p>Completed template and an established and implemented rotation for reviews.</p>	<p>Provost, Program Chairs</p>	<p>Completed: process developed and a schedule of two program reviews per year</p>	<p>First set of Program Reviews to take place September 2021 with the MBA, PhD, PsyD, and a cycle of reviews established.</p> <p>September 2020 BOT approved program review process and agenda.</p> <p>Two annual internal reviews have been completed, the third is underway and will be completed by April 30, 2021.</p> <p>An annual dashboard has been developed for each program.</p> <p>Feedback from Program Review is reflected in faculty responses and program changes.</p> <p>BOT Academic and Student Affairs committee reviews feedback from program reviews and actions arising as a result.</p>

STRATEGIC GOAL: ACADEMIC EXCELLENCE Academic Oversight and Management

Strategy 1.4.8 The development of a Master Academic Plan sets annual goals for high achievement and excellence.

Action	Metric	Target	Lead	Status	Completed Activities
<i>The Academic Master Plan drives quality programming and sets annual goals for high achievement and excellence.</i>	The development of an Academic Master Plan will set annual academic goals, build on opportunities and trends, and focus on academic excellence. Timeline: September 2021	Completion and implementation of the Academic Master Plan	Provost, Program Chairs	In Progress with an anticipated completion date of September 2021	The new Academic Master Plan will build its foundation on the Strategic Plan and create a pathway for continued academic excellence while demonstrating flexibility, responsiveness, and innovation.

ACADEMIC INFRASTRUCTURE AND TECHNOLOGY

Academic Infrastructure and Technology

The Academic Infrastructure and Technology area at Sofia University provides all connectivity across both the Palo Alto and Costa Mesa campuses as well as remote access for faculty, staff, and students. It is integral in creating flexibility and accessibility for a high-functioning institution with a focus on hybrid, online and on-campus learning. Highlights of activities and outcomes from strategies in this area related to the Strategic Plan are listed below. For a complete review and update of strategies in this area related to the Strategic Plan please refer to Appendix A.

- Completed: Wi-Fi network upgrades in the Palo Alto campus and full network upgrade of the Costa Mesa campus to ensure network connectivity, speed, and security.
- Implemented and provided support for Slack, Zoom, and 8x8 / VoIP systems to improve communication between staff, faculty, and students which enhanced collaboration and online learning outcomes.
- Due to Covid-19, quickly adapted to the new online working and education environment to provide capabilities for efficient remote working, successful online technology to continue to provide an outstanding learning experience, and increased IT support and responsiveness to meet the increased demands of an online learning environment.
- Substantially increased online security by reviewing current systems and processes and identifying and resolving security risks through use of critical system updates, security policy updates, and implementing single sign-on based in secure cloud servers that is more convenient and provides greater data protection.

STRATEGIC GOAL: ACADEMIC INFRASTRUCTURE AND TECHNOLOGY

Strategy 1. Help People Use Technology More Effectively.

Action	Metric	Target	Lead	Status	Completed Activities
Improve IT support to ensure IT support levels provide prompt and complete service for all staff, faculty, and students	Maintain a maximum 24- hour response time.	Maintain an IT support response time of less than 24 hours.	Director of IT	Completed	Maintained 24 -hour max response time (on average less than 2 hours)
	Timeline: Completed				
	Maintain support availability during all hours of operation.	Maintain support availability from during working hours and all classroom sessions.	Director of IT	Completed	Due to Covid-19 and increased usage of online education, increased availability hours for IT support to 7 days a week from 9AM to 10PM.
	Timeline: Completed				
	Perform quarterly surveys to measure user satisfaction of IT support.	Quarterly surveys gauging user satisfaction with IT support	Director of IT	In Progress with first survey to be administered by June 2021	
	Timeline: June 2021				
	Hire IT support staff to maintain current levels of support.	Hiring of an IT support specialist/system administrator	Director of IT	In Progress with an anticipated completion date of June 2021	
	Timeline: June 2021				

<p><i>Improve collaborative tools, ensure ability and support for emerging forms of online teaching and for improving collaboration across departments</i></p>	<p>Review and improve collaborative tools and provide support to allow for online collaboration and engagement through modern video conferencing software.</p> <p>Timeline: June 2021</p>	<p>Complete move to Microsoft Teams to expand availability of video conferencing and collaborative tools to all staff, faculty, and students.</p>	<p>Director of IT</p>	<p>In Progress with an anticipated completion date of June 2021</p>	<p>Initial testing of Microsoft Teams with a subset of faculty, students, and staff completed successfully including LTI integrations with Canvas.</p> <p>Provided Zoom and Slack capabilities for online classroom sessions and for video conferencing between faculty, students, and staff.</p>
	<p>Explore extensions to the Canvas system that can provide a more engaging educational experience while providing faculty and staff a means to better analyze how students are meeting the educational outcomes.</p> <p>Timeline: December 2021</p>	<p>Research and implement extensions to the Canvas system to improve education experience and data analysis.</p>	<p>Director of IT</p>	<p>Completed and Ongoing</p>	<p>Researched and recommended Canvas studio to provide a more engaging and interactive video learning experience.</p>
<p><i>Keep technology and inventory up to date and identify and forecast the future upgrades needed for state-of-the-art teaching and</i></p>	<p>Undertake an inventory of existing equipment and identify gaps.</p> <p>Timeline: June 2021</p>	<p>Complete review of inventory of existing equipment and identify and resolve gaps in technology or availability.</p>	<p>Director of IT</p>	<p>Completed and Ongoing</p>	<p>Completed initial inventory of all computers/laptops.</p> <p>Due to Covid-19 and the need for working from home, provided laptops to all staff.</p> <p>Due to Covid-19, the plans for in-house classroom technology upgrades have been postponed.</p>

workflow efficiency.

Given the Covid-19 pandemic and the demands of online synchronous learning and remote working, provide tools and support to meet the increased demand in IT related needs

<p>Initiate a review of current conference call technology to ensure efficiencies and effectiveness, optimizing student learning and student experiences.</p> <p>Timeline: Completed</p>	<p>Implementation of the most up to date, efficient and successful conference call technology that will allow Sofia to continue to attract students, increase enrollments and provide an outstanding learning experience.</p>	<p>Director of IT</p>	<p>Completed</p>	<p>Implemented and maintained Slack/Zoom/8x8 (VoIP) to ensure communication between students, faculty, and staff as well as provide successful online delivery of courses.</p>
<p>Initiate review of current remote working environment to ensure effectiveness of staff.</p> <p>Timeline: Completed</p>	<p>Ensure staff have access to technology and databases to function effectively in their roles</p>	<p>Director of IT</p>	<p>Completed</p>	<p>Reviewed staff technology requirements for remote working and provided laptops to all staff and provided VPN access to internal networks for relevant users.</p>
<p>Initiate review of IT support coverage to ensure that the support needs of users due increased demand for IT related services is met.</p> <p>Timeline: Completed</p>	<p>Review increased demand for IT support and ensure that IT support coverage provides timely and effective assistance.</p>	<p>Director of IT</p>	<p>Completed</p>	<p>Reviewed IT support demand due to Covid-19 and, in result, increased IT support availability and response times to ensure the ongoing success of our students, faculty, and staff</p>

STRATEGIC GOAL: ACADEMIC INFRASTRUCTURE AND TECHNOLOGY

Strategy 2 Provide Secure Services and Systems.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Maintain a modern protected network by keeping network capacities ahead of demands of our users while maintaining security.</i>	Ensure the network coverage and bandwidth meets current and forecasted demand. Timeline: December 2021	Review network to ensure coverage and bandwidth meets forecasted demand over the next five years.	Director of IT	Completed and Ongoing	Ensured network coverage and bandwidth meets current demand by upgrading all Wi-Fi network equipment in the Palo Alto campus
	Ensure current network technology is up to date and maintained to provide reliability and security.	Maintain up-to-date network technology to ensure availability and security of network services	Director of IT	Completed and Ongoing	Upgraded all network equipment at the Costa Mesa campus Proposed network equipment upgrades for approaching end-of-life equipment in the Palo Alto campus

ENROLLMENT MANAGEMENT

Enrollment Management

The art and science of managing student enrollment forms the essence of initiatives undertaken by the area of Enrollment Management. It is vital to the long-term success of many institutions because, for colleges and universities across the United States, tuition and fees can make up a very large percentage of their budget. The ability for Sofia University to deliver on its mission is directly tied to the work that is done in Enrollment Management. Planning is centered around a holistic understanding of Sofia's enrollment environment and ready-to-present strategies that are goal-orientated, actionable, measurable, and aligned with institutional priorities. Following are some highlights of activities and outcomes of strategies that were identified in the Strategic Plan. For a comprehensive review and update of additional strategies please refer to *Appendix A*.

- Successful implementation of a new Customer Relations Management (CRM) system: *Element Lead Management System* which provides the ability to better track potential applicants and sets out a nurturing process by the Admissions team for both potential and current students. Admissions Counselors are now instantly notified via email when a new lead has filled out Sofia's online lead form, thereby creating an additional tracking system of prospects. The ability to track data has improved exponentially through the implementation of this CRM and is now utilized across multiple departments to implement/achieve new goals on a quarterly and yearly basis.
- The launching of a new official Sofia website took place in the spring of 2019 with revisions to the Domestic and International Admissions portal and the addition of an International Hub, a COVID-19 Hub, and an MBA Chinese language program page. This will provide easy access of information for international students, the latest updates for all students related to the pandemic, and an accessible language program page for Chinese MBA students. Future additions to the website will include a portal for Domestic and International Partnerships, an Alumni Portal/Hub, and various testimonials from students and alumni as well as additional marketing materials.
- The development of a new Admissions Resource Portal provides training materials, enrollment calendars, onboarding documents, email communication templates, scholarship applications, state authorization talking points, performance fact sheets and other materials to assist staff with consistent and effective service to potential applicants and current students.
- Overall enrollments for 2019/20 exceeded target of 500 FTEs. For 2019-20 we reported 1,066 FTE to IPEDS.
- A new Strategic Enrollment Management Plan is being developed with a completion date of December 2021.

STRATEGIC GOAL ENROLLMENT MANAGEMENT

Strategy 3.1.1 Marketing, Branding and Recruitment

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>The website is effectively designed and critical to recruitment, retention, and to enhancing the profile of the university within the marketplace.</i></p>	<p>Assess the effectiveness of the current webpage. Undertake a review of the webpage and its overall effectiveness related to recruitment, communication, and profile within the market.</p>	<p>Completed review with recommendations for moving forward.</p>	<p>Director of Marketing and Director of International Partnerships and Recruitment</p>	<p>Completed initial review April 2019.</p>	<ul style="list-style-type: none"> • New Sofia website launched, along with lead forms added to all pages on the new site - March 2019. • Covid-19 hub created to provide relevant updates to international students – completed March 2020, in progress pending COVID. • Domestic & International Admissions Portal created – March 2019. • International Hub developed and launched – March 2019. • Communication process implemented wherein all website updates are managed in-house by the marketing team – March 2019. • International Alumni Employment Data Report completed on January 2021 and showcased newfound data on our MBA/MSCS programs. • Sofia Alumni Feedback Survey completed – November 2020. <ul style="list-style-type: none"> ○ Domestic Audience – 7,660 invitations sent / 49 students responded – 0.1% response rate. ○ International Audience – 737 invitations sent / 9 students responded – 0.1% response rate. • International Student Office Portal Revamped - October 2020.
		<p>Increase average session duration (how long a prospective student is on our site) by 20% year over year through 2023. (Target 3 minutes by 2023.)</p>		<p>In Progress: Second phase of website and compliance update with an anticipated completion date of September 2021.</p>	
		<p>Increase page per session (number of pages by session prospect visits) by 20%. (Target 3 pages per session by 2023.)</p>		<p>Met 20% increase in session duration, exceeded page by session by 5%, exceeded bounce rate target by 2% - 2020/2021 school year, reported February 2021.</p>	
		<p>Lower bounce rate (how quickly a prospect exits our site) by 15% (Target 48% bounce rate by 2023).</p>			

<p><i>A new Strategic Enrollment Management Plan successfully sets directions for targeted marketing efforts and future enrollments.</i></p>	<p>The development of a Strategic Management Enrollment Plan that will map out future initiatives and identify enrollment targets and marketing strategies</p>	<p>Completion of the Strategic Enrollment Management Plan</p>	<p><i>Director of Marketing and Director of International Partnerships and Recruitment</i></p>	<p>In Progress with an anticipated completion date of December 2021</p>	<ul style="list-style-type: none"> • Adding fresh student testimonials to our website and marketing collateral materials– in progress • Create an Alumni Hub/Portal/Community/Events for our domestic and international graduates – in progress (early stages) • Track data/create surveys/ individual student outreach to learn about our domestic alumni employment outcomes – in progress (early stages)
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STRATEGIC GOAL ENROLLMENT MANAGEMENT

Strategy 3.1.2.1 Policy and Procedure Development; 3.1.4.1.1 Training and Development for Staff

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>Employees are adequately trained and informed in best practices related</i></p>	<p>Develop a comprehensive document on best practices related to enrollment management strategies and related policies and</p>	<p>Completion of comprehensive document. Implementation of one comprehensive</p>	<p><i>Director of Recruitment and Director of Admissions</i></p>	<p>Completed Spring 2019 On Going: Training sessions continuing annually</p>	<p>Training materials/content created for all systems/platforms used by the Admissions Team:</p> <ul style="list-style-type: none"> • Tawk • Element • Campus Café • Admissions Workflow Presentation

to Enrollment Management.

procedures. Provide annual refresh training sessions to assist in maximizing employee performance, resulting in effective practices and increased enrollments.

training session per year.
Increase domestic enrollments at a rate of 3% per year.

Increase overall enrollments to 500 FTEs

On-track to exceed 3% increase for the 20/21 school year.

Exceeded target. Sofia reported 1,066 FTE for FY 2019-2020 via IPEDS.

- a. Graduate: 1,061
- b. Undergrad: 5

- Program Training FAQ's

FINANCIAL SUSTAINABILITY

Financial Sustainability

The financial stability and sustainability of Sofia University are paramount to fulfilling its mission. As a for-profit institution the University relies almost exclusively on tuition revenues and fees to drive its operations. Accurate budget forecasting including enrollment predictions, combined with streamlined processes and efficiencies contribute to a financially healthy organization. After a challenging period, Sofia is on track to a break-even status with plans for the creation of a financial reserve that will better position itself to deal with unexpected events and a dynamic environment. Below are listed some of the significant initiatives being undertaken that build on strategies identified in the Strategic Plan. To review additional updates on all strategies please refer to *Appendix A*.

- As identified in the Strategic Plan, the University was able to **meet** and **exceed** the targets of increased overall enrollment to 500 and 1,000 Full Time Equivalents (FTEs) ahead of schedule. Most of the FTEs are in the MBAO program. This had a significant impact on revenues in support of operations and decreased forecasted net income of (\$494,248) to (\$268,378). Operations forecasting for 2021/22 and 2022/23 show significant net income, more than \$4 million in each of the two years. This is due in large part to the expansion of new Chinese MBA programs administered through Sofia's Global College.
- Work is well underway to address the matter of building sustainable staff/faculty ratios. With anticipated growth in revenues and programming, while remaining mindful of the importance of efficiencies, the University is in the process of identifying an ideal mix of staff support and ratio of student to faculty in the quest of providing a quality and life changing experience to learners.
- In progress is an analysis of the costs and margins for each program, with the resulting data informing decision-making in terms of course offerings and better management of budget and financial resources. This break -even analysis for each program will be tracked starting with the 2021/22 fiscal year.
- Looking to secure its future, Sofia has taken measures to build in a financial reserve in the amount of \$200,000 for the 2020/21 fiscal year. Going forward a reserve with funds sufficient to cover 2 months of payroll expenses by the 2023/24 fiscal year will be implemented.
- The development and revision of certified STEM based degree programs will respond to market demand and attract both domestic and international students. Also, additional certificate, learning badges and micro credentials will be developed and offered to alumni as a laddering opportunity and incentive to enrol into degree programs.

STRATEGIC GOAL: FINANCIAL SUSTAINABILITY Moving away from a negative cash flow

Strategy 4.1.3 Cost Measures: Sustainable scheduling of classes.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Assess and monitor required teaching load units as per contract.</i>	Ensure that teaching load requirements are met. Timeline: June 1, 2021	Targets of 21 units per year for Program Chairs and 36 units for Core Faculty are met annually.	Provost, Program Chair	Completed with annual monitoring	An assessment of cost implications of moving teaching load to Chairs and core faculty over adjuncts will be done by June 1, 2021.
<i>Increase enrollment to 500 FTEs.</i>	Develop marketing and enrollment strategies with input from across the institution that will yield a significant increase in overall enrollments. Special incentives, creative use of social media and website and collective efforts will be imperative to success. Timeline: June 1, 2021 for strategies. January 2022 for target of 500 FTEs.	Meet or exceed target of 500 FTEs.	CFO, Director of Enrollment Management, Provost	Exceeded Target. <i>Sofia reported 1,066 FTE for FY 2019-2020 via IPEDS.</i> <i>a. Graduate: 1,061</i> <i>b. Undergrad: 5</i>	Draft 3-year enrollment and related budget completed for MBAO-1, (Master of Business Administration Overseas) MBAO-2 and MATPO (Masters of Transpersonal Psychology Overseas).

STRATEGIC GOAL: FINANCIAL SUSTAINABILITY

Strategy 4.1.4 Sufficient enrollment: Increase enrollment to break even point 4.1.5 Increase enrollment to make a profit

Action	Metric	Target	Lead	Status	Completed Activities
<i>The development and revision of certified STEM based degree programs will respond to market demand and attract both domestic and international students</i>	Certified STEM based programs are developed, approved, and implemented.	Implementation of all STEM based programs.	AVPAA, MSCS faculty member, Director of International Partnerships and Recruitment.	STEM programs already operational as all courses in programs are currently being taught in rotation. MSCS, MBA, and dual degree MBA/MSCS STEM approved.	Confirmed that MSCS and MBA/MSCS operate under CIP Code 11.0701 which has already been approved and can be advertised immediately as STEM programs. MBA/MSCS letter of notification sent to WSCUC, approval. Expected August 2021
<i>Expansion of graduate certificates, course related learning badges and micro credentials marketed to alumni as refreshers for their professional practice will serve as incentives and laddering opportunities to enrol in degree programs.</i>	Certificates and micro credentials are developed and implemented. Timeline: Sept. 2021	A minimum of 3 new certificates and/or micro credentials implemented by Sept. 2021	AVPAA	MBA STEM SEVIS approved by Board of Trustees Expected: August 2021 MBA/MSCS WSCUC approval. Expected August 2021 Certificates under development	

with expected implementation date of Sept. 2021.

STRATEGIC GOAL: FINANCIAL SUSTAINABILITY Moving away from a negative cash flow

Strategy 4.1.6 Sustainable faculty and staff ratios

Action	Metric	Target	Lead	Status	Completed Activities
<i>Build sustainable staff ratios.</i>	Determine the most appropriate and cost-effective staff-to-student ratios. September 2021	25-32 staff members to support the university.	Director of HR, CFO	Current count at 24, excluding VPAA/Provost. Once VPAA/Provost is hired, at 25.	Developing JD for VPAA/Provost advertisement Analyzing current and future support needs for Fin Aid, Student Services, Global College, IT, HR, Business Office, Marketing/Enrollment
<i>Build sustainable student (FTE) to faculty ratio.</i>	Determine the most appropriate and cost-effective student (FTE) to faculty ratios. September 2021	Maintain student (FTE) per faculty ratio at or below 15.	Director of HR, CFO	currently 8.8 students (FTE)/faculty	Renewed 5-year contract with Zijng, expecting 200 new students/year (approximately 50 FTE) Online programs are being added (MBAO-2 and MATPO) for Fin Aid, Student Services, Global College, IT, HR, Business Office, Marketing/Enrollment

STRATEGIC GOAL: FINANCIAL SUSTAINABILITY Using resources effectively

Strategy 4.2.1 Cost analysis for each program and department.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Understand the costs for each course, program, and department to inform budget creation and decisions on program/course offerings.</i>	Undertake an analysis of costs relative to each course, program, and department. Timeline: December 1, 2021	Completed data with a breakdown of all costs.	CFO	In Progress with an anticipated completion date of June 2021	Building profitability model. Department level direct costs available. In the process of creating a consultative budgeting process involving staff, faculty, and Program Chairs

STRATEGIC GOAL: FINANCIAL SUSTAINABILITY A secure pathway for the future

Strategy 4.3 Develop a financial reserve for a secure future

Action	Metric	Target	Lead	Status	Completed Activities
<i>Provide financial security through the creation of a Financial Reserve</i>	Create a reserve with funds sufficient to cover 2 months of payroll expenses by FY 23-24.	\$150,000 by FYE 22-23	CFO	In Progress and commencing with the FY21-22	Working on creating parameters for financial operations such as reserve targets, levels of investment, periodic financial program reviews

***STUDENT SERVICES:
“ONE UNIVERSITY, TWO
CAMPUSES”***

Student Services: “One University, Two Campuses”

The Student Services area of Sofia University performs an integral function through its registration of and support for all domestic and international students at the University. The quality of students’ educational experience is a direct outcome of the systems in place to ensure student success and an outstanding quality learning experience. Guaranteeing a seamless online registration experience, soliciting student feedback through satisfaction and course evaluation surveys, alumni surveys, and improving retention and graduation rates are but some of the critical initiatives in this area. Collection of data and close collaboration with the office of Institutional Research strengthen the work of Student Services and provide strong indicators of Sofia’s success in terms of student support services. Some highlights of activities underway as they relate to strategies in the Strategic Plan are described below. For a comprehensive report of all strategies in this area please refer to *Appendix A*.

- **Course Evaluations/Surveys:** Revised student surveys are in the process of being developed including an evaluation on institutional climate and an evaluation template with a timetable for administering each one. These are essential to get feedback from our students on how we support them during their studies at Sofia and will help to improve Student Services to reach retention and graduation goals.
- **Career Service Center:** Our Career Resource Center which is currently under development will help students reach their career goals and receive guidance and access to jobs in relations to their degree program. The Center will help student identify careers, network with employers, receive coaching on writing resumes and prepare them for interviews.
- **Virtual Writing Lab:** The University is proud is announce the launch of the Student Virtual Writing Lab which will assist students in refining their writing skills to assist with course work.
- **Student Senate:** The formation of a Student Senate will provide a forum for all student voices and express the needs and desires of students to the University administration and faculty. It will be an advocacy body for the rights and responsibilities of all Sofia students. A Student Senate Leader has been appointed and the Senate is expected to be functioning in the fall 2021.

Strategic Goal: Student Services: “One University, Two Campuses” Student Experience at both Campuses

Strategy 1.1 Student Experience at either campus should be the same.

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>1.1 Students experience outstanding quality services from Faculty and Staff at both campuses.</i></p>	<p>Undertake a review and develop a process to be implemented at both campuses to improve and ensure a positive student experience from admission to graduation.</p>	<p>Completion of a cross-departmental collaboration and review system for improving student experience at Palo Alto campus.</p>	<p>Director of Student Services/Director, Global College</p>	<p>For Palo Alto Campus: In Progress with an anticipated date of December 1, 2021</p> <p>Deferred pending ability to initiate face to face teaching for the undergraduate degree completion programs and face to face MBA and MSCS programs at Costa Mesa Campus.</p>	<ul style="list-style-type: none"> • Enrollment Committee established, weekly meetings held to discuss every new admission for each quarter and ensure a seamless admission, registration, and orientation for each new student. (committee consists of Director of Student Service, Admissions staff, Financial Aid staff, DSO, and Registrar staff) • Student Services Committee established and conducted ongoing monitoring and support of current student academic progress and registration by weekly meetings. (committee consists of Provost, Director of Students Service, DSO, and Registrar staff) • Policy & Procedures Committee established to review and improve policies and procedures through bi-weekly meetings. (committee consists of two faculty members, Senior Registrar, Director of Student Service, and Librarian) <p>The quality of international students’ experience was also enhanced by the following completed activities:</p>
	<p>Timeline:</p> <p>Palo Alto Campus December 1, 2021</p> <p>Costa Mesa Campus: Deferred</p>	<p>Operations and student services at Costa Mesa Campus have been deferred during COVID-19. When Costa Mesa Campus becomes operational, the</p>			

	comparative review will be undertaken.			<ul style="list-style-type: none"> • Palo Alto Campus International Student Relocation Guide was created in December 2019. • Pre- arrival services were offered to initial F-1 students including Visa Virtual FAQ's appointment and DSO "hands on" service
Establish surveys/evaluations including an evaluation on institutional climate as well as student satisfaction with customer service. Timeline: August 1, 2021	Completed surveys and evaluations template with a timetable for administering each one. Satisfaction rate of 80% or higher, or a majority of responses in the range of Excellent to Very Good	Director of Student Services	<p>In progress with an anticipated completion date of August 1, 2021.</p> <p>Completed: 1) Course Evaluations are being done every quarter, 2) Intensives & Seminar Evaluation, 3) Transition from On-site to Online Course delivery Survey due to Covid</p> <p>In-progress to be launched by July 1, 2021: 1) After the first quarter Student</p>	<ul style="list-style-type: none"> • Course evaluation surveys were sent out to students quarterly with response rate of 39.1% between 2019 and 2020, 12.2% higher than 2018. The average satisfaction rate for 2020 is 87%, 2.6% higher than 2019. • Satisfactory surveys for each of MATP & PhD seminars were launched in Fall 2019. with overall rating score of 81% in Fall 2019. • Intensive surveys for MACP were launched in Fall 2019. 72.3% of students rated their overall experience as excellent or very good or good between Fall 2019 and Fall 2020. • Surveys for each student who exits the program were completed and will be administrated starting 2021 summer. • Survey for retention after the first quarter was completed and will be administrated stating 2021 summer. <p>International Alumni Employment Data Report was completed in January 2021 and showcased newfound data on MBA/MSCS.</p>

				<p>Satisfactory Survey, 2) Exit (Withdrawal & Graduation) Student Satisfactory Survey, 3) Annual Climate Survey</p>	<ul style="list-style-type: none"> • programs that 43% of international alumni's starting salary is above \$70,000. • Sofia Alumni Feedback Survey was completed in November 2020 with an overall satisfaction rate regarding academic quality of 77.8%. • A satisfaction survey regarding virtual classroom experience was administrated in May 2020. 100% of students agree that they are comfortable in the virtual classes provided by Sofia. 87.5% feel themselves a part of a learning community while participating in virtual classes. <p>A closed-loop survey structure was established to ensure best practice derived from survey results: The Institutional Research Department (IR) creates and implements surveys based on various program chairs and departments' needs and requests. IR collects the data and sends to different review committees. The committees analyze survey results and make decisions on necessary changes to address problems to improve student satisfaction. Provost and VP of Operations monitor the implementation of the changes and recommendations.</p>
<p><i>Improved Student Retention and Graduation Rate.</i></p>	<p>Establish a strategy of effective student support services, including career services, full staff writing lab, and</p>	<p>The effective student support services strategy was completed and implemented</p>	<p>Director of Student Services</p>	<p>Career Resource Center (CRC): We are in the process of establishing a Career Resource</p>	<ul style="list-style-type: none"> • A Virtual Writing Lab (VWL) was established, and three full-time staff members were hired to support student academic success and professional writing.

counseling center, to deliver a marked improvement in first-year retention and graduation rate.

Timeline: December 1, 2021

thought establishment of writing lab, career services and counselling center with 100% utilization by at least 30% of enrolled students.

Center with a target of July 1, 2021.

Virtual Writing Lab (VWL) has been established and is up and running well and is fully staffed.

The writing lab staff has not tracked the percentage of usage to date but will begin tracking immediately.

Counseling Center will defer establishment until we re-build PsyD program.

In progress with an anticipated completion date of December 1, 2021

- The Virtual Writing Lab was endorsed by faculty and was integrated into class activities which exponentially increased the participant numbers. For instance, from December 2020 to February 2021, 27 students have used the VWL, and some of them used it for multiple semesters.

Mid-quarter course instructor evaluation was conducted. A list of students demonstrating unsatisfactory performance with suggestions for corrections were formulated. For example, 24 students received mentoring, direction and support in Summer and Fall 2020 to improve their academic performance.

Functioning Student Senate

	<p>First-year retention rate target of 60%. Graduation rate target of 60%. Both excluding MBAO which has retention rate of 99% and graduation rates of 89%.</p>		<p>Most recent first term retention rates over 5 years: BA 81% MA 84% PhD 79% Graduation rates over 4 years: BA 43% MA 69% PhD 12%; 31% over 7 yrs.</p>	
<p>Appoint a student Senate leader. Student Senate creates a charter. Establish student activities.</p> <p>Timeline: December 31, 2021</p>	<p>A functioning student Senate leader is appointed. Full student senate committee consists of at least four students.</p>	<p>Director of Student Services</p>	<p>In progress with an anticipated completion date of September 2021</p> <p>Completed: Student Senate created a Charter</p>	<ul style="list-style-type: none"> • Student Senate leader was appointed. • The Student Service Department held quarterly meetings with the student Senate to monitor and provide advice and to organize student activities. For example, student Senate created a Sofia University Student Gathering page and community at Facebook in May 2019. • The Student Senate routinely formulated a list of student concerns and sent to the Student Services. <p>A closed-loop feedback process was established to respond to student issues:</p>

To be completed: Full student senate committee is not set up due to low enrollment. Target date will be December 31, 2021

Concerns are raised to different departments to be addressed accordingly. Student Services conducts follow-up conversations regarding problem-solving/improvement progress with the Student Senate Leader.

Conclusion

The Strategic Plan Update demonstrates that, in the wake of significant challenges and a dynamic environment, Sofia University has responded well to many of the identified calls to action from the original Plan. There has been much activity brought to completion, and while there may be gaps or actions that remain in progress, accountability has been maintained through a timeline and articulated processes for successful execution. Perhaps of greatest concern now is that of financial sustainability. This remains a significant hurdle, but its importance has been drastically mitigated because of successful cost management efforts and strategic enrollment initiatives. In addition, there is evidence that Sofia has a well-reasoned plan in place for increased enrollments, particularly with the impressive success of the Chinese MBA programs which continue to grow and enhance revenues through the Global College. The addition of a full-time Vice-President Administration/CFO has also strengthened the financial area with in-house expertise and more effective long- range planning and forecasting.

Appendix A presents a comprehensive accounting of strategies related to the Strategic Plan up until 2021. This template is the institution's workplan that validates a commitment to continuous improvement. Sofia will address issues and seek creative solutions as it looks to the future. The completion and implementation of new processes, policies, data collection, reviews and other initiatives will contribute to drive Sofia forward in realizing its vision of providing a transformative educational experience to its learners. There is much optimism across the University with the realization that Sofia is gaining momentum and that the future will indeed be an exciting one.

APENDIX A

Academic Excellence

STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.1 Faculty

Strategy 1.1.1 Fully utilize Core Faculty. Reduce expenditures on adjunct faculty salaries.

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>Course load baselined, projected, optimized for all faculty.</i></p>	<p>Project teaching load for future quarters for all core faculty and review for appropriateness, given faculty service and contribution to teaching. Establish target cost/budget for adjuncts for each program.</p> <p>Timeline: June 2021</p>	<p>Determine standard teaching load equivalent for core faculty at 36 units per year.</p>	<p>Program Chairs with Provost</p>	<p>In Progress with an anticipated completion date of June 2021</p>	<p>All faculty contracts have been reviewed to ensure that there is equity, fairness, and consistency in our course teaching expectations of core faculty.</p> <p>The standard teaching expectation of core faculty is 9 course credit hours/quarter x 3 quarters or total credit hours of 27 each year. Some credit hour requirements may be substituted for administration and service expectations. Where anomalies have been discovered, standardized expectation contracts are being updated across all faculty. Consultation process: AVP, Program chairs, faculty, and HR Director</p>
	<p>Timeline: Budget: June 2021; Project annually, update quarterly</p>	<p>Costs for adjuncts to be determined as part of annual instructional budget and will not exceed 40%</p>	<p>Provost/CFO</p>	<p>FY'19/20 adjunct cost at 38%</p>	<p>Attach reports on core/adjunct faculty teaching/program. Better management of budget resulting in effective forecasting.</p>

<i>Teaching loads reported and tracked.</i>	Create reports of actual courses taught and students per course. Distinguish Core and Adjunct. Timeline: Quarterly	Completed Reports used in budget preparation.	Provost/Registrar	Tracking of teaching loads has commenced and will remain on going.	Reported quarterly
<i>Adjunct teaching costs monitored and within target range.</i>	Compare actuals with projected costs. Timeline: Quarterly	Efficient forecasting and allocation of resources resulting in balanced budgets.	Provost/Program Chairs	On Going and reported quarterly	

STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.1 Faculty
Strategy 1.1.2 Fair market compensation for experienced faculty.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Fair market salary ranges are determined and documented.</i>	Obtain data and reports, analyze current salary comparison rates for comparable schools to assess market salary levels relative to qualification and experience. Timeline: December 2021	Final report generated with recommendations and conclusions.	HR, Provost	In Progress with an anticipated completion date of December 31, 2021.	Decisions will be made relative to possible market-driven salary adjustments. A completed market review by Provost focused on competitiveness of salaries for core and adjunct faculty.

<i>Faculty qualifications accessed and communicated.</i>	Create system to assess faculty qualifications and assign appropriate salary grades. Consider degrees held, experience, publications and accomplishments. Timeline: December 2021	Creation of faculty salary grid.	HR, Provost	In Progress with an anticipated completion date of December 31, 2021.	The grid will provide consistency and transparency in assessing faculty qualifications and salaries.
<i>Fair market salary levels paid to current and prospective faculty.</i>	Make appropriate adjustments to faculty salaries pending data outcomes and/or upon contract renewal. Timeline: December 2021	Fair, competitive salaries	CFO/Provost/HR	Market study of salaries is in progress. Study completed June 2021 and adjustments December 2021	HR reviews all contracts to ensure consistency.

STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.1 Faculty

Strategy 1.1.3 Faculty recruitment and retention plans developed for each department/program.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Attract and retain quality faculty.</i>	Program needs identified as well as a diversity of staff backgrounds, qualifications and teaching/professional experience. Review of faculty retention.	Established and standardized process for vetting of faculty qualifications and credentials. Core staff hired to ensure	Provost, COS	Standardized hiring process established and completed.	Full staff of MBAO faculty hired. All MBAO faculty hold a PhD and extensive teaching experience. Entirely new staff hired for English language MBA; all MBA faculty have PhDs from major Universities and extensive teaching experience. New MSCS faculty hired, PhDs in computer science and department managers at major IT companies.

<p><i>A faculty/staff attrition study is undertaken.</i></p>	<p>Report completed and shared with BOT and Program Chairs Timeline Completed</p>	<p>program quality and consistency, adjunct faculty hired to bring necessary insights, experiences. Completed review of faculty retention. Reduce turnover</p>	<p>HR</p>	<p>Completed</p>	<p>Completed 2020 Feedback provided to BOT and Program Chairs</p>
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STRATEGIC GOAL: ACEDMIC EXCELLENCE 1.1 Faculty

Strategy 1.1.4 Provide opportunities and processes for Faculty development and support.

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>Provide supports for faculty to enhance teaching effectiveness. The development of a new Centre for Excellence in Teaching and</i></p>	<p>Creation of a Center of Excellence for Teaching and Learning. Timeline: June 1, 2021</p>	<p>Center operational and services the Sofia community</p>	<p>Provost/Program Chairs/Center Director</p>	<p>In Progress with an anticipated completion date of June 2021</p>	<p>Current Director of Dissertation Office will assume role as Director of the new center. The Center currently encompasses all Canvas and technical training, writing lab, dissertation support center, syllabi development, instructional support materials, and Dr. Frager’s repository for research in transpersonal psychology project.</p>

<p><i>Learning (CETL) will form the nexus of support and teaching effectiveness for faculty.</i></p>				
<p><i>As part of the CETL, an online Teaching and Learning support service initiative will be created.</i></p>	<p>All faculty engage in technical and other training developed in the Center and make use of research materials. A report on completion of faculty training and data on Center resource usage will be created.</p>	<p>All faculty go through mandatory training and make use of the substantive resources in the Center</p>	<p>Provost/Director of IT</p>	<p>In Progress with an anticipated completion date of December 2021</p>
	<p>Timeline: December 2021</p>			
<p><i>As part of the CETL, a review of online training options keeps abreast of important trends and best practices and provides accessible</i></p>	<p>A review of online training options will be created to ensure that Sofia has the technology support needed for delivering its programs.</p>	<p>Completed review. Every two years a technology use and review undertaken</p>	<p>Director of IT</p>	<p>In Progress with an anticipated completion date of December 2021</p>
	<p>Timeline: December 2021</p>			

<i>support for faculty. Develop faculty onboarding and training courses for instructional use of Canvas LMS.</i>	Develop training onboarding programs. Timeline: December 2021	Training and onboarding completed with participation by all new faculty	Provost/Director IT	In progress with an anticipated completion date of December 2021	Design phase has commenced. IT and AVP are in the process of building a faculty on-boarding course in Canvas.
	<i>Standardization of course templates provide consistency in teaching across the institution.</i>	Course master templates created for teaching faculty use in every program. Timeline: December 2021	Completion of master templates which are used for all courses	Provost/IT	In Progress with an anticipated completion date of December 2021

STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.2 Students and Alumni

Strategy 1.2.1 Students meet minimum admission standards.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Admitted students meet minimum admission standards.</i>	Quality of prospective student standards to be in alignment with what is published for each degree. Timeline: Immediately	All students meet entry requirements for program. Entering students have a minimum	Provost and Enrollment Management	Completed and On Going	

	Committee meets as necessary to review any candidate assigned to them and reports back to Admissions and Program Chairs regarding their decision. Timeline: Immediate implementation of standards	GPA of 3.0/ 2.0 for undergraduate		
<i>Students meet expectations for Statement of Purpose (SOP) and interview (if applicable).</i>	Develop rubrics for assessment of student Statement of Purpose. Timeline: June 2021	Standardized rubric developed	Provost, Dept. Chairs, Enrollment Management	In Progress and being updated with an anticipated completion date of June 2021.
	Develop interview script (where applicable) and rubric for assessing student interviews. Timeline: June 2021	Standardized rubric developed	Provost, Dept. Chairs, Enrollment Management	In Progress and being updated with an anticipated completion date of June 2021.
<i>International students meet SEVIS standards for degree equivalency and</i>	Evaluate academic requirements for international students to ensure they are aligned with Sofia's academic excellence	100% compliance with SEVIS standards.	Provost and Office of International	Completed

<i>language competency.</i>	and growth strategy.		Completed	CPT policies, quarterly audits, regular monitoring of students are updated and completed.	
<i>All enrolled students meet Satisfactory Academic Progress or are on notice and on track to achieve it.</i>	Develop policy to ensure data input to SEVIS port reflect university academic policy. Timeline: Completed	100% compliance with SAP	Pr ov os t	In Progress with an anticipated completion date of June 2021 and then ongoing.	
<i>Flexible Admission option for exceptionally experienced working professionals will provide greater accessibility and attract mid-</i>	Sofia will develop various options to support the higher education needs of experienced and highly qualified working professionals. Timeline April 2022	MBAO program will be used as the pilot program for a flexible admission (FA) option with a cap of 25% of students admitted.	Provost/MBA Program Chair	In Progress: Pilot program will be implemented April 2021	Flexible Admission Criteria has been developed and approved. Pilot program ready; teachers hired, pedagogy/technology set, course development in progress.

career applicants.

STRATEGIC GOAL: ACEDMIC EXCELLENCE 1.2 Students and Alumni

Strategy 1.2.2 Programs attract and retain excellent students.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Attract and retain quality applicants for programs</i>	Quality level of incoming students is improved through academic excellence, effective marketing and established standards for entry. Timeline: December 2021	Retention rate at 85%	Enrollment Management, Marketing, Program Chairs	In Progress: Program Reviews to enhance quality; new marketing initiatives; standardized entry requirements. Anticipated completion date December 2021	
<i>Targets for student retention levels met or exceeded.</i>	Establish student retention target levels with the view of providing an exceptional student learning experience. Timeline: May 2021 in alignment with 2021-2022 budget	Retention exceeds 85%	Chairs, Student Affairs, Faculty Team	Ongoing Most recent first term retention rates over 5 years: BA 81% MA 84% PhD 79% MBAO 99%	

Chairs and faculty provide clear course syllabi and ensure quality in their teaching. Timeline: refreshed by June 2021 and then On Going	Program Chairs monitor course syllabi every semester.	Provost, Chairs	In Progress with an anticipated completion date of June 2021	All syllabi are reviewed and available on the first day of class.
All programs must dedicate at least 10% of the curriculum to concepts in Transpersonal Psychology. Timeline: refreshed by June 2021 and then On Gong	All programs meet the 10% minimum	Provost, Chairs	Completed: All programs in question meet 10% requirement except MSCS, to be completed by June 2021	MBA/MBAO and BSBA meet the 10% transpersonal requirement now as well as PsyD, MA/PhD, and MACP. MSCS is in progress.
Student Affairs ensures clear, regular communication and accessibility for students with a focus on exceptional service. Expert use of Campus Café. Timeline: December 2021	Student Affairs team completes training on Campus Café and develops a Canvas- based student onboarding course	Chairs, Student Affairs, Faculty Team	In Progress with an anticipated completion date of December 2021	
Collect student feedback about their experience at Sofia. Continue to implement Student	Evaluations are done every term for every course	Provost, Chairs	In Progress with an anticipated completion date of	

Evaluations for each course which are then reviewed by Chair and faculty, with appropriate actions and adjustments.

December 2021.

Timeline: December 2021

In conjunction with Student Affairs, implement annual student survey.

Implement annual student survey.

Chairs, Student Affairs, Faculty Team

In Progress with an anticipated completion date of December 2021

Student surveys have been implemented over the years; going forward the survey will be refreshed and calendarized.

Timeline: December 2021

STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.3 Curriculum and Pedagogy

Strategy 1.3.1 Published programs and curricula are congruent with policies, procedures, accreditation, and regulatory standards.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Published programs meet all regulations and standards.</i>	Published programs are reviewed and monitored regularly.	Programs are reviewed annually to ensure adherence to standards.	Program Chairs, Faculty, adjuncts as needed	In Progress: 2020 reviews and annual reviews going forward.	Course syllabi are reviewed by the Chair each term. The Curriculum Committee, consisting of 3 faculty members, meets quarterly to review the curriculum, advise on courses for the catalog, and review selected syllabi for adherence to core learning objectives.
	Course syllabi and objectives are reviewed and consistent with institutional,	Course syllabi submitted and reviewed every semester to ensure alignment.			

<p><i>Webpage and course calendars are updated and current</i></p>	<p>program and course learning outcomes. Timeline: June 2021 for 2020 reviews A review of the webpage and course calendar to ensure accuracy and currency. Timeline: renewed and implemented for 2021</p>	<p>Completed review</p>	<p>In Progress with an anticipated completion date of June 2021</p>
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STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.3 Curriculum and Pedagogy

Strategy 1.3.2 Curriculum design is informed by market research and industry surveys.

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>A market survey undertaken by an external consultant will provide insights, data and new ideas for increased programming and marketing effectiveness.</i></p>	<p>Contract with STAMATS produces data for student recruitment and enrollment, re-positioning of website, and competitive programming.</p>	<p>Completed survey with market analysis for dissemination</p>	<p>Provost</p>	<p>Completed: STAMATS Market Study shared with stakeholders</p>	<p>STAMATS survey completed; information shared with faculty and Board. Results will be used for future decision making on programming and marketing strategies.</p>

<p><i>Feedback from students, alumni, and internship employers re Sofia's competitiveness, accuracy of programs from information on the website/catalogue, and satisfaction that programs meet student interest is used for future decision-making.</i></p>	<p>Annual student /alumni survey. Timeline: December 2021</p>	<p>An overall satisfaction rate of 80% or higher in student surveys.</p>	<p>Marketing, IT, Program Chairs</p>	<p>Completed</p>	<p>2020 Alumni and student survey results and feedback shared with Program Chairs.</p>
<p><i>Feedback from Program Review is reflected in faculty responses and program changes</i></p>	<p>BOT Academic and Student Affairs committee reviews feedback from program reviews and actions arising as a result of reviews.</p>	<p>All programs will be reviewed every five years</p>	<p>Provost, Chair Academic and Student Affairs Committee</p>	<p>In Progress and will be implemented after first round of Program Reviews in September 2021.</p>	<p>See 1.4.7 for further information on Program Reviews.</p>

STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.3 Curriculum and Pedagogy
Strategy 1.3.3 Regular curriculum review and oversight supports academic quality.

Action	Metric	Target	Lead	Status	Completed Activities
<i>All curricula are in compliance with WSCUC guidelines.</i>	Curricula reviewed by the Curriculum Committee and Provost for compliance with WSCUC guidelines. Timeline: December 2021	Curriculum Committee meets quarterly to review and ensure compliance.	Provost	<p>Completed: MBAO reviewed and renegotiated reflecting compliance.</p> <p>In Progress: Remaining programs will be in compliance with an anticipated completion date of December 2021.</p>	After undertaking program reviews and updates (e.g., the MBAO program, the BSBA and BAP programs), WSCUC guidelines have been used as part of this review process to ensure that all our programs remain compliant. As we implement our formal external degree program review this year, WSCUC requirements including its Core Commitments and Criteria for Review (CFR's) in support of accreditation will be used as part of the program self-study.

Strategic Goal: ACADEMIC EXCELLENCE 1.4 Academic Oversight and Management

Strategy 1.4.1 Place the right faculty in the right positions to improve efficiency, quality of learning and effective use of human resources.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Ensure that faculty expertise is directed to the appropriate courses to maximize students' learning experience and promote quality learning.</i>	Faculty course assignments are reviewed annually. Program Chairs will determine course assignments that will include feedback from core and adjunct faculty as well as a faculty qualification form. Timeline: Refreshed processes by December 2021	Each instructor has a credential form showing background and courses eligible to teach	Provost/program Chairs	In Progress: Refreshed processes by December 2021 and ten On Going	A complete review was undertaken regarding qualifications of MBA and MSCS faculty. This resulted in the hiring of a new PhD qualified staff for the MBA and a substantial upgrade in faculty for MSCS.
<i>Annual Faculty evaluations conducted</i>	Faculty evaluations are undertaken annually Timeline: December 2021	Evaluations completed on all faculty	Provost/Program Chairs	In Progress with an anticipated completion date of December 2021.	

STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.4 Academic Oversight and Management

Strategy 1.4.2 Include the support of admissions, outreach and marketing in recruitment of faculty and assignment of faculty responsibilities.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Provide support and streamlined processes to better respond to prospective faculty candidates through website, social media and direct communication.</i>	Scheduled marketing events, some via LinkedIn and Facebook, and streamlining of recruitment processes to attract faculty and Program Chairs. Timeline: Refreshed processes by December 2021	2 marketing events per year. Annual review of hiring success rates.	Marketing, HR, Program Chairs	In Progress, completed schedule by June 1, 2021.	
<i>Effective communication between faculty and Marketing and Enrollment and Admissions will monitor opportunities and identify latest challenges and trends, with the aim of successful</i>	Admissions, marketing and Enrollment staff meet regularly with Provost and Program Chairs. Timeline: June 1, 2021	Systematic Product Knowledge Training. Two meetings per year.	Direction of Marketing, Enrollment	In Progress, completed schedule by June 1, 2021.	AVP and faculty supporting MBO marketing by attending Q&A sessions and supporting the Global College. Faculty Senate started a marketing committee to support social media and other marketing efforts. Marketing has attended Senate meetings. Marketing Director attends Provost Council.

implementation of strategic and effective initiatives in the marketing area.

STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.4 Academic Oversight and Management

Strategy 1.4.3 Peer reviews and student feedback (i.e., student-teacher evaluations) incorporated into curriculum decisions and course assignments.

Action	Metric	Target	Lead	Status	Completed Activities
Use of peer reviews and student feedback will assist with faculty development and course improvements.	Program Chairs review results of peer review process and student evaluations and provide constructive feedback to faculty and adjuncts. Timeline: Refreshed processes by December 2021	Peer review processes annually. Review of student-teacher evaluations annually.	Program Chairs	Completed: Two surveys In Progress: another comprehensive survey will be initiated in 2021	Alumni and current student surveys completed. International and MBO student surveys completed.

STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.4 Academic Oversight and Management

Strategy 1.4.4 Scheduling of Classes

Action	Metric	Target	Lead	Status	Completed Activities
<i>Improved timely decisions regarding the scheduling of classes provide clear expectations to students, overall efficiencies, effective use of staff and marketing initiatives, and improved quality due to appropriate planning.</i>	New schedules will be developed that include flowcharts, breaks and holidays all factored into the program for each cohort of students. Timeline: December 2021	Registration will have class schedules one year in advance.	Program Chair	In Progress with an anticipated completion date of December 2021	Global College integrated scheduling efforts with Registrar and Dean of Students
<i>Course schedules are planned well in advance and provide up to date information for</i>	Class schedules reviewed annually. Timeline June 2021.	Up to date and informative class schedule developed at least 6 months in advance	Provost/Registrar	In Progress with an anticipated completion date of June 2021	

students' timetables.

Chinese course schedules related to Chinese timetable and calendar are planned well in advance and assist with recruitment.

Schedule developed and agreed to by Sofia and Chinese language partners. Timeline: June 2021	Annual schedule complete	Director Global College/Provost	Completed for June 2021 timetable and then ongoing.	2021 Schedule adjusted to accommodate Chinese New Year
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STRATEGIC GOAL: ACADEMIC EXCELLENCE 1.4 Academic Oversight and Management

Strategy 1.4.5 Changing quarterly system to Tri-Semester system

Action	Metric	Target	Lead	Status	Completed Activities
<i>This initiative has been suspended and will be reviewed and reconsidered in the future.</i>	Change current quarterly system to a tri-semester system	Align quarterly based course schedule to more common semester system	Provost/Registrar	SUSPENDED	

STRATEGIC GOAL: ACADEMIC EXCELLENCE Academic Oversight and Management

Strategy 1.4.6 Regular curriculum review, and the development/ implementation of Learning Outcomes, provide rigor, set clear learning objectives and enhance academic quality.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Learning Outcomes provide institutional alignment, accountability, define expectations and enhance academic quality</i>	<p>Learning outcomes are developed at the Institutional (ILO), Program (PLO) and Course (CLO) level.</p> <p>Timeline: ILOs completed; June 2021 for PLOs; December 2021 for CLOs</p>	<p>Learning outcomes at all three levels are developed, implemented and reviewed regularly.</p>	<p>Provost, Office of Institutional Research, Program Chairs</p>	<p>Completed: Institutional Learning Outcomes</p> <p>In Progress: Revision of Program Learning Outcomes with an anticipated completion date of June 2021</p> <p>In Progress: Course Learning Outcomes with an anticipated completion date of December 2021</p>	<p>A faculty team led by the Provost revised the ILOs and the revised version was approved by the BOT in September 2020.</p> <p>A consultant was hired to work with each Program Chair to do a detailed mapping of PLOs to ILOs. This mapping process showed the need for revision of PLOs for most programs. This revision is underway.</p> <p>After this is complete all CLOs will be mapped to the PLOs and evaluated.</p>

STRATEGIC GOAL: ACADEMIC EXCELLENCE Academic Oversight and Management

Strategy 1.4.7 The development of a cycle of Program Reviews provides rigor, external validation and enhances academic excellence

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>Program Review process provides rigor, external assessment and validation, and enhances academic quality.</i></p> <p><i>An internal review will be undertaken and an external review every five years.</i></p>	<p>A standardized process and rotating schedule of Program Reviews will be developed on a five-year cycle.</p> <p>Timeline: July 2021</p> <p>A template for internal and external reviews will be developed and approved by the BOT Academic and Student Affairs Committee.</p> <p>Timeline: September 2020</p>	<p>Completed template and an established rotation for reviews.</p>	<p>Provost, Program Chairs</p>	<p>Completed: process developed and a schedule of two program reviews per year. Program Review Policy has been developed and approved by the Board.</p>	<p>First set of Program Reviews to take place September 2021 with the MBA, PhD, PsyD, and a cycle of reviews established.</p> <p>September 2020 BOT approved program review process and agenda.</p> <p>Two annual internal reviews have been completed and the third is underway and will be completed by April 30, 2021.</p> <p>An annual dashboard has been developed for each program. Feedback from Program Review is reflected in faculty responses and program changes.</p> <p>BOT Academic and Student Affairs committee reviews feedback from program reviews and actions arising as a result of reviews.</p>

STRATEGIC GOAL: ACADEMIC EXCELLENCE Academic Oversight and Management

Strategy 1.4.8 The development of a Master Academic Plan sets annual goals for high achievement and excellence.

Action	Metric	Target	Lead	Status	Completed Activities
<i>The Academic Master Plan drives quality programming and sets annual goals for high achievement and excellence.</i>	The development of an Academic Master Plan will set annual academic goals, build on opportunities and trends, and focus on academic excellence. Timeline: September 2021	Completion and implementation of the Academic Master Plan	Provost, Program Chairs	In Progress with an anticipated completion date of September 2021	The new Academic Master Plan will build its foundation on the Strategic plan and create a pathway for continued academic excellence while demonstrating flexibility, responsiveness and innovation.

Academic Infrastructure and Technology

STRATEGIC GOAL: ACADEMIC INFRASTRUCTURE AND TECHNOLOGY

Strategy 1. Help People Use Technology More Effectively.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Advance IT education by making training sessions, learning modules, and webinars available to staff, faculty, and students.</i>	Create repository of documentation. /tutorials for all systems and make them easily accessible to students, faculty, and staff. Timeline: June 2021	Completed repository of documentation /tutorials for all systems	Director of IT	Completed and Ongoing	Initial repository of documentation /tutorials for staff have been completed.
	Create and hold quarterly training sessions for faculty and staff. Timeline: December 2021	Quarterly training sessions for faculty and staff implemented.	Director of IT/Provost	In Progress with a completion date of December 2021	Basic training course for Canvas has been created for students and faculty. Currently, training course has been administered for faculty. Held staff-wide training in use of the Campus Café SIS system.
	Perform annual surveys to gauge user's feedback of their comfort level with using current systems.	Annual surveys to gauge user knowledge of current systems are implemented	Director of IT	In Progress with first survey to be completed by June 2021	

Improve user experience by incorporating modern principles of user-centered design that focuses on mobile-standards, compliance, and a seamless and intuitive experience.

Timeline: June 2021

Establish and maintain UI/UX standards	Annual review of standards	Director of IT	Completed and Ongoing
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Timeline: December 2021

Review all systems/websites and ensure compliance with federally mandated availability of features.	Annual review of all systems/websites	Director of IT	In Progress with an anticipated completion date of June 2021	Review of systems' ADA compliance 50% completed
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Timeline: June 2021

Improve back-end integration of tools and systems with focus on maintaining data security and accessibility.

<p>Improve integration of services so users can switch between systems seamlessly.</p> <p>Timeline: June 2021</p>	<p>Completed integration of systems</p>	<p>Director of IT</p>	<p>In Progress with an anticipated completion date of June 2021</p>	<p>Single sign-on for 50% of systems completed</p>
<p>Review current systems and identify gaps in usability, accessibility, and features.</p> <p>Timeline: December 2021</p>	<p>Completed review with identification of all gaps and implemented solutions</p>	<p>Director of IT</p>	<p>In Progress with an anticipated completion date of December 2021</p>	<p>Surveys conducted to gauge user experience for the Campus Café SIS system that concluded that the system is just adequate for current needs but is lacking in usability, features and ability to scale.</p> <p>Started initial research into possible SIS systems based on usability, features, and varying budget availability over the next few years.</p>
<p>Use modern APIs to pull information between systems.</p> <p>Timeline: December 2021</p>	<p>Fully implement back-end integrations to synchronize systems</p>	<p>Director of IT</p>	<p>In Progress with an anticipated completion date of December 2021</p>	<p>Canvas integration with Campus Café SIS system 50% completed</p>
<p>Establish data governance plan for all shareable data.</p> <p>Timeline: December 2021</p>	<p>Completion of data governance plan</p>	<p>Director of IT</p>	<p>In Progress with an anticipated completion date of December 2021</p>	

Improve IT support to ensure IT support levels provide prompt and complete service for all staff, faculty and students.

Maintain a maximum 24-hour response time. Timeline: Completed	Maintain an IT support response time of less than 24 hours.	Director of IT	Completed	Maintained 24 -hour max response time (on average less than 2 hours).
Maintain support availability during all hours of operation. Timeline: Completed	Maintain support availability from during working hours and all classroom sessions. Timeline: Completed	Director of IT	Completed	Due to Covid-19 and increased usage of online education, increased availability hours for IT support to 7 days a week from 9AM to 10PM.
Perform quarterly surveys to measure user satisfaction of IT support. Timeline: June 2021	Quarterly surveys gauging user satisfaction with IT support	Director of IT	In Progress with first survey to be administered by June 2021	
Hire IT support staff to maintain current levels of support. Timeline: June 2021	Hiring of an IT support specialist/system administrator	Director of IT	In Progress with an anticipated completion date of June 2021	
<i>Improve collaborative</i> Review and improve collaborative tools and provide support	Complete move to Microsoft Teams to expand	Director of IT	In Progress with an anticipated	Initial testing of Microsoft Teams with a subset of faculty, students, and staff

tools, ensure ability and support for emerging forms of online teaching and for improving collaboration across departments

to allow for online collaboration and engagement through modern video conferencing software.

Timeline: June 2021

availability of video conferencing and collaborative tools to all staff, faculty, and students.

completion date of June 2021

completed successfully including LTI integrations with Canvas.

Provided Zoom and Slack capabilities for online classroom sessions and for video conferencing between faculty, students and staff.

Explore extensions to the Canvas system that can provide a more engaging educational experience while providing faculty and staff a means to better analyze how students are meeting the educational outcomes.

Timeline: December 2021

Research and implement extensions to the Canvas system to improve education experience and data analysis.

Director of IT

Completed and Ongoing

Researched and recommended Canvas studio to provide a more engaging and interactive video learning experience.

Keep technology and inventory up to date and identify and forecast the future upgrades needed for

Undertake an inventory of existing equipment and identify gaps.

Timeline: June 2021

Complete review of inventory of existing equipment and identify and resolve gaps in technology or availability.

Director of IT

Completed and Ongoing

Completed initial inventory of all computers/laptops.

Due to Covid-19 and the need for working from home, provided laptops to all staff.

Due to Covid-19, the plans for in-house classroom technology upgrades have been postponed.

state-of-the-art teaching and workflow efficiency.

Perform analysis of future technological advances and establish a technology replacement plan built within operating budget and based on the needs of our users.	Complete technology replacement plan built within operating budget and based on user needs.	Director of IT	Completed and Ongoing	Performed analysis on trends of future technological advances and started an initial technology replacement plan based on an expected 3–5-year lifecycle, expected budget, and future growth forecasts.
Timeline: December 2021				

Improve ability to access digital content by establishing tools and services to support generation of accessible digital content

Establish digital content type standards to ensure accessibility and data preservation.	Review and establish policy digital content type standards.	Director of IT	In Progress with an anticipated completion date of December 2021	
Timeline: December 2021				

Provide a standard set of tools for users for creating digital content to ensure compatibility and	Establish and provide a standard set of software tools for staff and	Director of IT	Completed and Ongoing	Provided Adobe software for staff.
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Given the Covid-19 pandemic and the demands of online synchronous learning and remote working, provide tools and support to meet the increased demand in IT related needs.

improve collaboration.	faculty for digital content creation				
Timeline: December 2021					
Create online repositories that can be accessible to students, faculty, and staff.	Complete online repositories for digital content	Director of IT	Completed and Ongoing		Created SharePoint/OneDrive repositories for each department
Timeline: December 2021					
Initiate a review of current conference call technology to ensure efficiencies and effectiveness, optimizing student learning and student experiences.	Implementation of the most up to date, efficient and successful conference call technology that will allow Sofia to continue to attract students, increase enrollments and provide an outstanding learning experience.	Director of IT	Completed		Implemented and maintained Slack/Zoom/8x8 (VoIP) to ensure communication between students, faculty, and staff as well as provide successful online delivery of courses.
Timeline: Completed					
Initiate review of current remote working environment to ensure effectiveness of staff.	Ensure staff have access to technology and databases to function	Director of IT	Completed		Reviewed staff technology requirements for remote working and provided laptops to all staff and provided VPN access to internal networks for relevant users.

Timeline: Completed	effectively in their roles				
Initiate review of IT support coverage to ensure that the support needs of users due increased demand for IT related services is met.	Review increased demand for IT support and ensure that IT support coverage provides timely and effective assistance.	Director of IT	Completed	Reviewed IT support demand due to Covid-19 and, in result, increased IT support availability and response times to ensure the ongoing success of our students, faculty, and staff	
Timeline: Completed					

STRATEGIC GOAL: ACADEMIC INFRASTRUCTURE AND TECHNOLOGY

Strategy 2. Provide Secure Services and Systems.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Maintain a modern protected network by keeping network capacities ahead of demands of our users while maintaining security.</i>	Ensure the network coverage and bandwidth meets current and forecasted demand. Timeline: December 2021	Review network to ensure coverage and bandwidth meets forecasted demand over the next five years.	Director of IT	Completed and Ongoing	Ensured network coverage and bandwidth meets current demand by upgrading all Wi-Fi network equipment in the Palo Alto campus

Respond to and anticipate information security threats to ensure the current systems and processes mitigate risks of exposure of personal identifiable information

Ensure current network technology is up to date and maintained to provide reliability and security.	Maintain up-to-date network technology to ensure availability and security of network services	Director of IT	Completed and Ongoing	Upgraded all network equipment at the Costa Mesa campus
Timeline: December 2021				Proposed network equipment upgrades for approaching end-of-life equipment in the Palo Alto campus
Enhance connectivity and access for off-campus users.		Director of IT	Completed and Ongoing	Setup VPN access for staff and third-party vendors that required access to the Palo Alto campus' internal network
Timeline: June 2021				
Establish processes and audit current systems and services to ensure compliance with ever-increasing regulations such as NIST SP 800-171	Review current systems and processes and create IT policy and update systems to meet compliance requirements	Director of IT	In Progress with an anticipated completion date of December 2021	Started initial IT policy document 60% complete. After review, recognized Campus Café authentication as a vulnerability and currently moving all authentication to azure AD. Moved authentication for Canvas out of internal Active Directory servers to Azure AD to increase security and user experience but continue to maintain internal AD for redundancy in case of azure AD service issues. Reviewed and updated current IT security policies in Office365 to increase data security and user account protection
Timeline: December 2021				

Explore the potential of moving key services to the Cloud to improve security and accessibility.

Enhance security awareness/education for all users. Timeline: December 2021	Provide quarterly emails with IT security tips and tricks as well as provide immediate notifications of any new threats	Director of IT	Completed and Ongoing	Provided security awareness emails to the Sofia community about various security threats such as phishing
Explore moving financial aid services to the cloud. Timeline: December 2021	Research and implement cloud-based financial aid software based on budget, security, and availability	Director of IT	Completed and Ongoing	Explored possibility of moving financial aid from Powerfaids to Campus Café or at the minimum, integrating Powerfaids with a cloud- based system to increase accessibility.
Explore moving library online database authentication to the cloud. Timeline: Completed	Research cloud-based library online database authentication.	Director of IT	Completed	Explored a cloud based single sign on authentication system for the online databases that would improve user experience and security but was concluded to not be worth the additional costs.
Establish policies for cloud -based data backup. Timeline: June 2021	Create and implement policies for cloud-based data backup.	Director of IT	Completed and Ongoing	Recommended OneDrive for all staff to keep their documents backed up for data security. Implemented CrashPlan data backups for key staff to ensure business continuity and disaster recovery.

STRATEGIC GOAL: ACADEMIC INFRASTRUCTURE AND TECHNOLOGY

Strategy 3. Support Innovation in Research and Education

Action	Metric	Target	Lead	Status	Completed Activities
<i>Improve data analytics to ensure the capture of institutional data and develop ways to better leverage the data to further improve educational outcomes and institutional workflows.</i>	Maintain and develop tools to capture relevant institutional data through surveys, APIs, and internal databases. Timeline: June 2022	Determine relevant institutional data and review and implement systems to ensure collection and availability.	Director of IT	Completed and Ongoing	Deployed quarterly course evaluation surveys to gather student feedback on the quality of Sofia University's instructors and course content
	Provide education and support for users to improve their data science literacy. Timeline: December 2021	Research data analytics in education and provide training to create a data driven decision making culture.	Director of IT	Completed and Ongoing	Provided access and instructions to institutional research staff on how to access and run reports on data collected from the course evaluation surveys and from the Campus Café SIS system's database

Promote innovation in education and research by providing access to emerging technologies and leveraging publicly available technologies.

Explore strategic collaborations or partnerships with corporate partners for early access to emerging technologies and foster innovation through experimentation.

Timeline: June 2022

Establish at least one new partnership or collaboration per year

Director of IT

In Progress with the aim to secure one new partnership by June 2022

Explore commercially and open-source technologies that can be leveraged to create value by reducing costs and improving educational outcomes.

Timeline: June 2022

Implement at least one new open-source technology per year

Director of IT

In Progress with the aim to implement one new open-source technology by June 2022

Enrollment Management

STRATEGIC GOAL: ENROLLMENT MANAGEMENT

Strategy 3.1.1 Marketing, Branding and Recruitment Strategy.

Action	Metric	Target	Leads	Status	Completed Activities
<i>Brand recognition initiatives are updated and current in alignment with best practices.</i>	Assess current practices and develop a strategy for social, online, website, international partnerships, and business development/outreach.	Completed targets to be identified in terms of frequency of hits/views on social media and website.	Director of Marketing, Director of International Partnerships & Recruitment (PDSO) and Director of Global College	Completed: Branding rehaul in 2019, further branding initiative In Progress following review of STAMATS with an anticipated completion date of September 2021.	<ul style="list-style-type: none"> • Marketing Communication SharePoint Website created April 2019 communicating all marketing campaigns and initiatives, access to approved collateral, branding guidelines, and upcoming recruitment events to staff. • Director of International Partnerships completed research and identified forty 2-year colleges with a high international student enrollment – February 2021. • Director of International Partnership reached out to 20 institutions via email to initiate partnership discussions – February 2021. • Director of International Partnership initiated discussions with local SEVP ESL schools. Ex. American English Language ESL School (AELS) decided not to move forward with partnership – February 2021.
	Branding of new marketing vendor-Spark 451. <i>Timeline: in progress with completion date of December 2021.</i>	Targets include: Increase number of returning visitors to account for 20% of all traffic, increase number of overall visitors by 40% by 2022 – 20% year over year. Lower bounce rate to 48%.	One new international partner per year.	In Progress: tracking website views, bounce, etc. with estimated completion date of January 2022.	

Overall marketing strategies are current and aligned with best practices.

	<p>Completion of new branding for Spark 451.</p>		<p>initiatives with an anticipated completion date of December 2021</p> <p>Branding for Spark 451 completed April 2019.</p>	<ul style="list-style-type: none"> • Potentially establish an exclusive Student and Exchange Visitor (SEVP) Pathway Partnership School by May 2021 • POLY English Language School partnership in final steps and possible completion by Spring 2021 • Establish partnership with a reputable Agent Partner in India by 2021 • Virtually meeting with interested community colleges around the US. to initiate early discussions of a Pathway Partnership with Sofia –ongoing
<p>Undertake a review of the university’s overall marketing strategy identifying gaps and opportunities. Include a competitive market analysis with the assistance of a consultant.</p> <p>Timeline: June 1, 2021</p>	<p>Completed review with recommendations for moving forward.</p>	<p>Director of Marketing</p>	<p>Completed branding for all marketing initiatives refreshed and aligned with new website April 2019.</p> <p>In Progress: Review of competitive analysis and recommendations with anticipated completion date of</p>	<ul style="list-style-type: none"> • Branding meetings regularly held with all chairs by program to better understand unique propositions, takeaways, etc. • STAMATS market analysis report completed September 2020 providing additional areas of opportunity to increase competitive edge.

The website is effectively designed and critical to recruitment, retention, and to enhancing the profile of the university within the marketplace.

<p>Assess the effectiveness of the current webpage. Undertake a review of the webpage and its overall effectiveness related to recruitment, communication and profile within the market.</p> <p>Timeline: June 1, 2021</p>	<p>Completed review with recommendations for moving forward.</p> <p>Targets moving forward:</p> <ul style="list-style-type: none"> • Increase average session duration (how long a prospective student is on our site) by 20% year over year through 2023. (Target 3 minutes by 2023.) • Increase page per session (number of pages by session prospect visits) by 20%. (Target 3 pages per 	<p>Director of Marketing and Director of International Partnerships and Recruitment</p>	<p>September 2021.</p> <p>Completed initial review April 2019.</p> <p>In Progress: Second phase of website and compliance update with an anticipated completion date of September 2021.</p> <p>Met 20% increase in session duration, exceeded page by session by 5%, exceeded bounce rate target by 2% - 2020/2021 school year, reported February 2021.</p>	<ul style="list-style-type: none"> • New Sofia website launched, along with lead forms added to all pages on the new site - March 2019. • Covid-19 hub created to provide relevant updates to international students – completed March 2020, in progress pending COVID. • Domestic & International Admissions Portal created – March 2019. • International Hub developed and launched – March 2019. • Communication process implemented wherein all website updates are managed in-house by the marketing team – March 2019. • International Alumni Employment Data Report completed on January 2021 and showcased newfound data on our MBA/MSCS programs. • Sofia Alumni Feedback Survey completed – November 2020. <ul style="list-style-type: none"> ○ Domestic Audience – 7,660 invitations sent / 49 students responded – 0.1% response rate. ○ International Audience – 737 invitations sent / 9 students
<p>Timeline: September 2021</p>				

Ensure that all domestic marketing materials coordinate with and complement international programs and partners.

	<p>session by 2023.)</p> <ul style="list-style-type: none"> • Lower bounce rate (how quickly a prospect exits our site) by 15% (Target 48% bounce rate by 2023). <p>Branded, compliant and optimized website.</p>			<p>responded – 0.1% response rate.</p> <ul style="list-style-type: none"> • International Student Office Portal Revamped - October 2020. • Adding fresh student testimonials to our website and marketing collateral materials– in progress • Create an Alumni Hub/Portal/Community/Events for our domestic and international graduates – in progress (early stages) • Track data/create surveys/ individual student outreach to learn about our domestic alumni employment outcomes – in progress (early stages)
<p>Assess current domestic marketing materials.</p> <p>Timeline: December 2021</p>	<p>Build Chinese website to meet and attract our growing Chinese market.</p>	<p>Director of Marketing and Director of International Partnerships and Recruitment, and Director of Global College</p>	<p>Completed Phase one - international strategic initiatives 2019-2020 with MBA Chinese language program page completed April 2019.</p> <p>In Progress: Phase 2 – develop a full</p>	<ul style="list-style-type: none"> • MBA Chinese language program page created April 2019. • Palo Alto Campus - International Student Relocation Guide developed and launched - December 2019. • Costa Mesa Campus – Relocation Guide to be completed - Spring 2021. • Sofia Strategic Proposal Collateral Material developed – December 2020.

Develop recruitment strategies to cope with COVID-19 and the impact on student enrollment and retention.

			Chinese language website - with anticipated completion date of December 2021.	<ul style="list-style-type: none"> • Sofia Program Viewbook to utilize across departments for initial partnerships & outreach purposes – February 2021. • Global College microsite created on sofia.edu main site – January 2020. • International Strategic Marketing Committee – initiated September 2020
<p>Assess all marketing materials, email communications and all resources going out to new prospects.</p> <p>Timeline: Immediately</p>	<p>Develop recruitment strategies to best communicate benefit of pursuing programs during COVID.</p> <p>Grow international market by 10% by 2023, with domestic international market targeting 2-3% by 2022, and 6% for global programs (MBA Chinese Language, Short-term, etc.).</p>	<p>Director of Marketing and Director of Recruitment</p>	<p>Completed and Ongoing, started at onset of COVID, March 2020.</p> <p>Completed Sept. 2020: Added Counseling Psychology Session Academic new start-dates: Winter, Spring & Fall completed month.</p> <p>Exceeded 10% lead to start for Winter quarter, January 2021 by 3%.</p>	<ul style="list-style-type: none"> • Transition to 100% virtual online format at onset of COVID, communicated via email to all continuing students, and COVID-19 hub created on website for continuing, new, and prospective students - March 2020. • Waive all application and Deposit Fees to increase applications to start for the Spring 2021 quarter – in progress and ONLY used to push applicants along the funnel process, thereby only targeting current in process app prospects. • Increase staff (full-time) by 1+ to effectively manage the workflow of the Admissions Team – complete by 2022-2023 • (OPTIONAL) Provide additional short-term - programs opportunities for CS & MBA to boost Enrollment by 2023.

MACP's Winter start, the first since previously starting only in Fall, provides a promising outlook.

- Maintain quarterly 10% and higher lead to start percentage for MACP program.

On Track to meet 60 MACP start goal for 20/21 school year.

- Enroll 60 MACP students annually.

On Track to meet 5% lead to start goal for all programs

- Increase lead to start minimums for all programs to 5%

Target drop out of app to start portion of the funnel to 15% or lower.

STRATEGIC GOAL: ENROLLMENT MANAGEMENT

Strategy 3.1.2.1 Policy and Procedures Development; 3.1.4.1.1 Training and Development for Staff.

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>Employees are adequately trained and informed in best practices related to Enrollment Management.</i></p>	<p>Develop a comprehensive document on best practices related to enrollment management strategies and related policies and procedures. Provide annual refresh training sessions to assist in maximizing employee performance, resulting in effective practices and increased enrollments.</p> <p>Timeline: December 2021</p>	<p>Completion of comprehensive document. Implementation of one comprehensive training session per year. Target to increase domestic enrollments at a rate of 3% per year.</p>	<p>Director of Recruitment</p>	<p>Completed Spring 2019</p> <p>On Track to exceed 3% increase for the 20/21 school year.</p> <p>Exceeded target. Sofia reported 1,066 FTE for FY 2019-2020 via IPEDS.</p> <p>c. Graduate: 1,061 d. Undergrad: 5</p> <p>On Going: Training sessions continuing annually.</p>	<ul style="list-style-type: none"> • Training materials/content created for all systems/platforms used by the Admissions Team: <ul style="list-style-type: none"> ○ Tawk ○ Element ○ Campus Café ○ Admissions Workflow Presentation ○ Program Training FAQ's • Admissions Resource Portal developed housing all training materials, enrollment calendars, onboarding docs, email communication templates, scholarship applications, state authorization talking points, performance fact sheets, etc. This is accessible to the admissions team, as well as staff - 2019. • Implemented Element Lead Management System - April 2019 <ul style="list-style-type: none"> ▪ Automated email drip campaigns sent to all new incoming prospects by program. ▪ Admissions counselors are instantly notified via email that new lead has filled out lead form - consistent and reliable access to leads.

Skilled staff are able to better support student needs through the enrollment process.

				<ul style="list-style-type: none"> International Office Implemented new CRM Enrollment System – Outreach - September 2020
<p>Implementation of workflow documents and short training sessions to ensure even distribution of workloads.</p> <p>Timeline: Effective immediately.</p>	<p>Established process for the distribution of workflow documents on a bi-weekly basis, supported by monthly short training sessions.</p>	<p>Director of Recruitment</p>	<p>Completed and actively ongoing on a weekly, biweekly and regular basis among staff.</p>	<ul style="list-style-type: none"> Director of Recruitment meets weekly with the Registrar, Dean of Student Services, PDSO, and Admissions Team to ensure all students are supported and nurtured through the overall enrollment process. Bi-weekly meetings between Director of Recruitment and Director of Marketing implemented to better strategize areas of opportunity to meet semester start goals and nurture new leads through application to start. One-on-One meetings between Director of Admissions and team to retrain/coach on enrollment processes.
	<p>An annual Student Satisfaction Survey with approval ratings of 80% or higher</p>		<p>In Progress: Surveys to be implemented beginning September 2020.</p>	
	<p>An annual Student Satisfaction Survey with referral/recommendation rating to attend Sofia of 80% or higher.</p>		<p>Routine process streamlined and developed by January 2022.</p>	

STRATEGIC GOAL: ENROLLMENT MANAGEMENT

Strategy 3.1 Intervention, communication, tracking and follow-up technologies (CRM) 3.2.2 Prospect Tracking 3.2.3 Early alert system/CRM.

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>Develop the ability to track and report marketing objectives, analytics and enrollment forecasting.</i></p>	<p>Update the current CRM (customer management system) to meet needs of enrollment and marketing strategies. Implement New Marketing Vendor with student connect applications-Spark-Element 451. Training and implementation of new system with admissions and staff.</p> <p>Implement strategies to lower cost per lead and cost per start.</p> <p>Timeline: March 1, 2021</p>	<p>CRM update completed as well as training.</p> <p>Comparing 19/20 vs. 20/21 Summer, Fall & Winter Data: Cost per lead target is \$82.40 (using 10% conversion rate based off higher average, and current cost per enroll of \$824 for the 20/21 school year).</p>	<p>Director of Marketing, Director of Recruitment and Director of International Partnership and Recruitment?</p>	<p>Completed: Marketing/Admissions CRM (lead management system) January - February 2019.</p> <p>In Progress to meet \$82.40 CPL by April 2022. Currently down by 21% comparing 19/20 and 20/21 school year.</p>	<ul style="list-style-type: none"> Marketing charged with pulling bi-weekly reporting capturing lead data, working in tandem with admissions team and international office to ensure goals are met. Bi-weekly marketing and enrollment committee created to strategize and report goals, areas of opportunity and updates for both domestic and global college efforts. Marketing/enrollment CRM launched January 2019 through Element 451. System meets both enrollment and marketing needs by providing a clear picture of the enrollment funnel from lead to start capturing CPL, CPS, etc. Training for CRM completed - February 2019. Upgrade Sofia's CRM and lead management system and efficiently integrate it by 2023. Director of Marketing to provide monthly international leads to Principal Designated School Official (PDSO). Utilize Outreach (CRM) to create and send systematic

Increase customer service through monitoring of prospecting practices and procedures.

Provide training in student flow and a “students first” mentality that considers the student journey and ensures an optimal customer experience.

Timeline: March 1, 2021

Included in training from above as well as weekly touchpoints/updates with staff.

Retention Campaign Targets:

- Enroll 60% of student population by second retention “register for classes email”, and additional 10% each week following through start date. (Total of 7 email campaigns sent out).

Director of Admissions, Office of the Registrar and Academics

Completed and actively ongoing on a weekly basis.

In Progress: Retention targets with estimated completion date of April 2022.

follow-up emails to prospective international students at the top of the funnel – ongoing.

- Currently recruiting international students from short-term non-accreditation programs -

- One-on-One meetings between Director of Recruitment and team to retrain/coach on systems and enrollment processes.
- Office of the Registrar and Director of Marketing implemented retention campaign sending emails to all continuing students with a reminder to register for classes each quarter beginning a week before registration opens, and each week all the way to the start of the quarter – 2019.
- Office of the Registrar, Academics created processes to publish courses in Canvas and process to track attendance. Publishing courses in Canvas has in the past, negatively impacted ‘student experience’ for new students to the university as well as continuing students. This continues to be an area of opportunity to better customer experience.

		<ul style="list-style-type: none"> • Increase open rate for first send out of retention campaign series to rate of 65% or higher. • Increase click-through rate for first send out to rate of 20% or higher. <p>Student Satisfaction Survey with an approval rating of 80% or higher</p> <p>An annual Student Satisfaction Survey with referral/recommendation rating to attend Sofia of 80% or higher.</p>		<p>In Progress:</p> <p>Surveying students and reporting has not been a regular, ongoing process. We are looking to streamline and develop both a surveying and reporting process, with an anticipated completion date of quarterly surveys sent and reported by January 2022.</p>	
<p><i>Develop custom automated communications to all prospects</i></p>	<p>Develop automated triggers in Campus Café that will support the admissions workflow.</p>	<p>Automated triggers in place including staff training.</p>	<p>Director of Marketing</p>	<p>Completed 2019</p>	<ul style="list-style-type: none"> • Campus Café training provided to all staff – new and refresh for current staff-initiated April 2021 including student onboarding.

and ensure regular communication and accessibility for students with a focus on exceptional service and expert use of Campus Café.

Training of staff on all updates.
 Student Affairs ensures clear, regular communication and accessibility for students with a focus on exceptional service. Expert use of Campus Café.
Timeline: June 2021

Target email open rate of 20% or higher and click-through rate or 8% or higher.

Exceeded email open rate by 14% as of January 2021. Click-through rate in progress with anticipated completion date of January 2022.

- Automated triggers created in Campus Café - January 2019.
- Automated email campaigns sent to all prospects once they fill out lead form through lead management CRM (Element) – April 2019.
- Several emails created for each segment (program) nurturing led to application (top of funnel)- April 2019.
- Campus Café Document Activity Tracking Templates created for each department – April 2019.
 - DSO
 - Registrar
 - Admissions

Identify Student Information System (SIS) that speaks to updated marketing CRM to fully integrate data seamlessly, moving away from manual processes.

Timeline:
 April 2022

CRM contract expires November 2021, aim to implement new SIS system by April 2022.

Director of Marketing, Director of Recruitment, Office of the Registrar, and Director of IT

In Progress: This initiative is still in the early stages with an anticipated completion date of 2022-2023.

- Preliminary meetings held between Director of Marketing, IT and Director of Recruitment to identify gaps in current two-prong system (separate lead CRM that does not speak to SIS) causing gaps in enrollment funnel and tasking admissions, team with manual intensive process to work lead through application and start.

STRATEGIC GOAL: ENROLLMENT MANAGEMENT

Strategy 3.3.1 Deploy Support Systems 3.4.1 Provide daily Point in Time reports.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Better support all Departments across the University with targeted strategies in Enrollment Management.</i>	Meet and seek feedback with all Departments to better understand needs and enrollment targets. Other topics to be discussed include student population, enrollment and fill rates by section, iterative FTE calculations, and additions of sections as needed. Timeline: March 1, 2021	Quarterly meeting with all Department Chairs and Executive Staff demonstration of successful communication. 500 FTE by June 2021, and 1000 FTE by June 2022.	Director of Recruitment and Director of International Partnerships and Recruitment	In Progress: IT support to enhance Campus Café capabilities by early 2022.	<ul style="list-style-type: none"> Marketing, Global College and International Office holding bi-weekly meetings to discuss current/upcoming enrollment strategy projects. Bi-weekly Marketing & Enrollment meetings with the President and CFO to provide update/feedback of current projects being executed – August 2020.
<i>Comprehensive reporting across all Departments for accurate forecasting.</i>	Regular reports provided on a semester basis. Timeline: Effective immediately.	Accurate forecasting from Departments assists in reaching overall annual enrollment targets. Achieve 90% success rate in forecasting. Quarterly enrollment target report updated daily,	Director of Recruitment, Department Chairs	In Progress: Partially completed Spring 2019 with an anticipated completion date of June 2021	<ul style="list-style-type: none"> Enrollment forecast spreadsheet created and implemented since Spring 2019. This document is used across all departments to keep track of leads, applicants, deferrals, and continuing students. Admissions and International Office held weekly meeting to keep track of #'s and students in various stages of the admissions process – Spring 2019. Enrollment Management Committee created September 2020, tasked with identifying opportunities to better retain student body across all programs.

data presented
bi-weekly,
allowing
opportunities
to strategize
and meet goals.

Meeting between academics, Director of
Marketing and Director of Recruitment

Financial Sustainability

STRATEGIC GOAL: FINANCIAL SUSTAINABILITY

Strategy 4.1.3 Cost Measures: Sustainable scheduling of classes.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Create a sustainable class schedule.</i>	Senior administration to meet with Program Chairs to review enrollment numbers and ensure accurate forecasting relative to budget.	Quarterly meetings. Enrollment targets met or exceeded.	Provost, CFO and Retention Committee	In Progress: to be done quarterly	An institutionalized quarterly process will be implemented as well as moving to an annual review and a 12-months to 18-months academic calendar with quarter reviews.
<i>Assess and monitor required teaching load units as per contract.</i>	Ensure that teaching load requirements are met.	Targets of 21 units per year for Program Chairs and 36 units for Core Faculty are met annually.	Provost, Program Chair	Completed with annual monitoring	An assessment of cost implications of moving teaching load to Chairs and core faculty over adjuncts will be done by June 1, 2021.

STRATEGIC GOAL: FINANCIAL SUSTAINABILITY

Strategy 4.1.4 Sufficient enrollment: Increase enrollment to break even point 4.1.5 Increase enrollment to make a profit

Action	Metric	Target	Lead	Status	Completed Activities
<i>Increase enrollment to 500 FTEs.</i>	Develop marketing and enrollment strategies with input from across the institution that will yield a significant increase in overall enrollments. Special incentives, creative use of social media and website and collective efforts will be imperative to success.	Meet or exceed target of 500 FTEs.	CFO, Director of Enrollment Management, Provost	Exceeded Target. Sofia reported 1,066 FTEs for FY 2019-2020 via IPEDS. e. Graduate: 1,061 f. Undergrad: 5	Draft 3-year enrollment and related budget completed for MBAO-1, (Master of Business Administration Online) MBAO-2 and MATPO (Masters of Transpersonal Psychology Online).
<i>Increase enrollment to 1000 FTEs.</i>	Continued aggressive and successful	Meet or exceed target of 1000 FTEs by	CFO, Director of Enrollment	Exceeded Target. Sofia reported 1,066	MBAO-1: projected 500 new students for next 2 fiscal years.

	strategies will be developed as well as new partnerships including international opportunities will be incorporated.	September 2022.	Management, Provost	FTE for FY 2019-2020 via IPEDS. a. Graduate: 1,061 b. Undergrad: 5 Anticipate FTE of 1,170 by FY2022	Assumes PT status (0.5 FTE = 250 FTE) MBAO-2: projected 200 new students for next 2 fiscal years. Assume PT status (0.5 FTE = 100 FTE). MATPO forecast will be made for FY 21-22 and onward.
<i>Maintain high annual student retention rate.</i>	Timeline: September 2022 Conduct weekly meetings to review enrollment, onboarding, and students' academic progress; use historical trends	Annual University level retention rate of 85% Degree retention rates: a. BA: 83% b. MA:85% c. MBAO: 99% d. DOC: 80%	CFO, Director of Enrollment Management	FY 19-20 retention of 85.5% New cohort rates (2016-2020) a. BA: 81% b. MA: 84.3% c. MBAO: 99.8% d. d. DOC: 79.2%	-Student Services conducts quarterly campaigns to retain students via emails and phone calls -obtain historical trends from IR -Will start quarterly student satisfaction surveys
<i>The development and revision of certified STEM based degree programs will respond to market demand and</i>	Certified STEM based programs are developed, approved and implemented.	All STEM based programs implemented by Sept. 2021.	AVPAA, MSCS faculty member, Director of International Partnerships	STEM programs already operational as all courses in programs are currently being	Confirmed that MSCS and MBA/MSCS operate under CIP Code 11.0701 which has already been approved and can be advertised immediately as STEM programs. MBA/MSCS letter of notification sent to WSCUC, approval. Expected August 2021

attract both domestic and international students.

Expansion of graduate certificates, course related learning badges and micro credentials marketed to alumni as refreshers for their professional practice will serve as incentives and laddering opportunities to enrol in degree programs.

Certificates and micro credentials are developed and implemented.

Timeline: Sept. 2021

A minimum of 3 new certificates and/or micro credentials implemented by Sept. 2021

AVPAA

and Recruitment.

taught in rotation. MSCS, MBA, and dual degree MBA/MSCS STEM approved. MBA STEM SEVIS approved by Board of Trustees

Expected: August 2021

MBA/MSCS WSCUC approval. **Expected August 2021**

Certificates under development with expected implementation date of **Sept. 2021.**

STRATEGIC GOAL: FINANCIAL SUSTAINABILITY

Strategy 4.1.6 Sustainable staff ratio

Action	Metric	Target	Lead	Status	Completed Activities
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<i>Build sustainable staff ratios.</i>	Determine the most appropriate and cost-effective staff-to-student ratios. September 2021	25-32 staff members to support the university.	Director of HR, CFO	Current count at 24, excluding VPAA/Provost. Once VPAA/Provost is hired, at 25.	-Developing Job Description for VPAA/Provost advertisement -Analyzing current and future support needs for FinAid, Student Services, Global College, IT, HR, Business Office, Marketing/Enrollment
<i>Build sustainable student (FTE) to faculty ratio.</i>	Determine the most appropriate and cost-effective student (FTE) to faculty ratios. September 2021	Maintain student (FTE) per faculty ratio at or below 15.	Director of HR, CFO	currently 8.8 students (FTE)/faculty	-Renewed 5-year contract with Zijing, expecting 200 new students/year (approximately 50 FTE) -Online programs are being added (MBAO-2 and MATPO)

STRATEGIC GOAL: FINANCIAL SUSTAINABILITY

Strategy 4.2.2 Cost analysis for each program and department.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Understand the costs for each course, program and department to inform budget creation and decisions on program/course offerings.</i>	Undertake an analysis of costs relative to each course, program and department. Timeline: December 1, 2021	Completed data with a breakdown of all costs.	CFO	In Progress with an anticipated completion date of June 2021	Building profitability model. Department level direct costs available. In the process of creating a consultative budgeting process involving staff, faculty and chairs

STRATEGIC GOAL: FINANCIAL SUSTAINABILITY

Strategy 4.3 Provide financial security through the creation of a financial reserve

Action	Metric	Target	Lead	Status	Completed Activities
<i>Provide financial security through the creation of a Financial Reserve</i>	Create a reserve with funds sufficient to cover 2 months of payroll expenses by FY 23-24.	by FYE 22-23	CFO	In Progress and commencing with the FY21-22	Working on creating parameters for financial operations such as reserve targets, levels of investment, periodic financial program reviews

Student Services: “One University, Two Campuses”

STRATEGIC GOAL: STUDENT SERVICES: “ONE UNIVERSITY, TWO CAMPUSES” Student Experience at both campuses

Strategy 1.1 Student Experience at either campus should be the same.

Action	Metric	Target	Lead	Status	Completed Activities
<p><i>1.1.1 Students experience outstanding quality services from Faculty and Staff at both campuses.</i></p>	<p>Undertake a review and develop a process to be implemented at both campuses to improve and ensure a positive student experience from admission to graduation.</p> <p>Timeline: Palo Alto Campus December 1, 2021</p> <p>Costa Mesa Campus: Deferred</p>	<p>Completion of a cross-departmental collaboration and review system for improving student experience at Palo Alto campus.</p> <p>.</p> <p>When Costa Mesa Campus becomes operational, the comparative</p>	<p>Director of Student Services/Director , Global College</p>	<p>For Palo Alto Campus: In Progress with an anticipated date of December 1, 2021</p> <p>Deferred pending ability to initiate face to face teaching for the undergraduate degree completion</p>	<ul style="list-style-type: none"> • Enrollment Committee established, weekly meetings held to discuss every new admission for each quarter and ensure a seamless admission, registration, and orientation for each new student. (committee consists of Director of Student Service, Admissions staff, Financial Aid staff, DSO, and Registrar staff) • Student Services Committee established and conducted ongoing monitoring and support of current student academic progress and registration by weekly meetings. (committee consists of Provost, Director of Students Service, DSO, and Registrar staff) • Policy & Procedures Committee established to review and improve

	review will be undertaken.		programs and face to face MBA and MSCS programs at Costa Mesa Campus.	<p>policies and procedures through bi-weekly meetings. (committee consists of two faculty members, Senior Registrar, Director of Student Service, and Librarian)</p> <p>The quality of international students' experience was also enhanced by the following completed activities:</p> <ul style="list-style-type: none"> • Palo Alto Campus International Student Relocation Guide was created in December 2019. • Pre- arrival services were offered to initial F-1 students including Visa Virtual FAQ's appointment and DSO "hands on" service.
Assess and review the instruments for student evaluation of courses, programs and services.	Completed inventory and effectiveness review of current instruments with recommendations for moving forward.	Director of Student Services and the Office of Institutional Research	In progress with an anticipated completion date of December 1, 2021	<ul style="list-style-type: none"> • An inventory of instruments for student's evaluation has been listed including the end-of-course questionnaire, interviews, institutional research, and external competitor research. • The Institutional Research Department was enhanced with an additional part-time position.
Establish surveys/evaluations including an evaluation on institutional climate as well as student	Completed surveys and evaluations template with a timetable for administering each one.	Director of Student Services	In progress with an anticipated completion date of August 1, 2021.	<ul style="list-style-type: none"> • Course evaluation surveys were sent out to students quarterly with response rate of 39.1% between 2019 and 2020, 12.2% higher than 2018. The average

satisfaction with customer service.

Timeline: August 1, 2021

Satisfaction rate of 80% or higher, or a majority of responses in the range of Excellent to Very Good

Completed: 1) Course Evaluations are being done every quarter, 2) Intensives & Seminar Evaluation, 3) Transition from On-site to Online Course delivery Survey due to Covid

In-progress to be launched by July 1, 2021: 1) After the first quarter Student Satisfactory Survey, 2) Exit (Withdrawal & Graduation) Student Satisfactory Survey, 3) Annual Climate Survey

satisfaction rate for 2020 is 87%, 2.6% higher than 2019.

- Satisfactory surveys for each of MATP & PhD seminars were launched in Fall 2019. with overall rating score of 81% in Fall 2019.
- Intensive surveys for MACP were launched in Fall 2019. 72.3% of students rated their overall experience as excellent or very good or good between Fall 2019 and Fall 2020.
- Surveys for each student who exits the program were completed and will be administrated starting 2021 summer.
- Survey for retention after the first quarter was completed and will be administrated stating 2021 summer.
- International Alumni Employment Data Report was completed in January 2021 and showcased newfound data on MBA/MSCS programs that 43% of international alumni's starting salary is above \$70,000.
- Sofia Alumni Feedback Survey was completed in November 2020 with an overall satisfaction rate

regarding academic quality of 77.8%.

- A satisfaction survey regarding virtual classroom experience was administrated in May 2020. 100% of students agree that they are comfortable in the virtual classes provided by Sofia. 87.5% feel themselves a part of a learning community while participating in virtual classes.
- A closed-loop survey structure was established to ensure best practice derived from survey results: The Institutional Research Department (IR) creates and implements surveys based on various program chairs and departments' needs and requests. IR collects the data and sends to different review committees. The committees analyze survey results and make decisions on necessary changes to address problems to improve student satisfaction. Provost and VP of Operations monitor the implementation of the changes and recommendations.

Improved Student Retention and Graduation Rate

Establish a strategy of effective student support services, including career services, full staff writing lab, and counseling center, to deliver a marked improvement in first-year retention and graduation rate.

Timeline: December 1, 2021

The effective student support services strategy was completed and implemented thought establishment of writing lab, career services and counselling center with 100% utilization by at least 30% of enrolled students.

Director of Student Services

Career Resource Center (CRC): We are in the process of establishing a Career Resource Center with a target of July 1, 2021.

Virtual Writing Lab (VWL) has been established and is up and running well and is fully staffed. **The writing lab staff has not tracked the percentage of usage to date but will begin tracking immediately.**

Counselling Center will defer establishment until we re-

- A Virtual Writing Lab (VWL) was established, and three full-time staff members were hired to support student academic success and professional writing.
- The Virtual Writing Lab was endorsed by faculty and was integrated into class activities which exponentially increased the participant numbers. For instance, from December 2020 to February 2021, 27 students have used the VWL, and some of them used it for multiple semesters.
- Mid-quarter course instructor evaluation was conducted. A list of students demonstrating unsatisfactory performance with suggestions for corrections were formulated. For example, 24 students received mentoring, direction and support in Summer and Fall 2020 to improve their academic performance.

Functioning Student Senate

	<p>First-year retention rate target of 85%. Graduation rate target of 60%. Both excluding MBAO which has retention rate of 99% and graduation rate of 89%.</p>		<p>build PsyD program.</p> <p>In progress with an anticipated completion date of December 1, 2021</p> <p>Most recent first term retention rates over 5 years: BA 81% MA 84% PhD 79%</p> <p>Graduation rates over 4 years: BA 43% MA 69% PhD 12%; 31% over 7 yrs.</p>	
<p>Appoint a student Senate leader. Student Senate creates a charter. Establish student activities.</p>	<p>A functioning student Senate leader is appointed. Full student senate committee consists of at</p>	<p>Director of Student Services</p>	<p>In progress with an anticipated completion date of September 2021</p>	<ul style="list-style-type: none"> • Student Senate leader was appointed. • The Student Service Department held quarterly meetings with the student Senate to monitor and provide advice and to organize student activities. For example,

	<p>Timeline: December 31, 2021</p>	<p>least four students.</p>		<p>Completed: Student Senate created a Charter</p> <p>To be completed: Full student senate committee is not set up due to low enrollment. Target date will be December 31, 2021</p>	<p>student Senate created a Sofia University Student Gathering page and community at Facebook in May 2019.</p> <ul style="list-style-type: none"> • The Student Senate routinely formulated a list of student concerns and sent to the Student Services. • A closed-loop feedback process was established to respond to student issues: Concerns are raised to different departments to be addressed accordingly. Student Services conducts follow-up conversations regarding problem-solving/improvement progress with the Student Senate Leader.
<p>1.1.2 Students encounter a seamless online registration process and class experience.</p>	<p>Ensure better workflow on email accounts, registration and CANVAS. Review current procedures and make necessary adjustments.</p> <p>Timeline: June 1, 2021</p>	<p>Renewed and improved workflow processes to ensure success with email, registration and use of CANVAS.</p> <p>Completed annual survey to determine student satisfaction with an</p>	<p>Registrar, Director of IT</p>	<p>In Progress with an anticipated completion date of June 1, 2021</p>	<ul style="list-style-type: none"> • Quarterly training sessions for faculty and staff were held. • The IT team extended service hours from 5pm to 10pm to provide prompt and complete service. • Intensive communication system for registration was established to ensure students received close attention and sufficient support. For example, weekly reminders were sent to students, and student lists of pending registration were shared with

approval rate of 80% or higher.

program chairs to promote enrollments and retention.

Ensure students can register easily and successfully online through the Student Portal when registration is opened.

Timeline: June 1, 2021 and reviewed quarterly.

Review of online functions and confirmation of operating successfully.

Registrar,
Director of IT

In Progress with an anticipated completion date of June 1, 2021

- The integration between the Student Portal and Canvas was improved as students were automatically granted access to the class on Canvas once they finished the online registration.
- Tutorials were created for students to easily use the Student Portal.
- A new enrollment system was created in which students were automatically provided clear directions for registering three classes for each quarter.
- IT and the Registrar responded to student inquires about online registration within 24 hours during business day.

STRATEGIC GOAL: STUDENT SERVICES: “ONE UNIVERSITY, TWO CAMPUSES” Student Experience on both campuses

Strategy1.1.1 Identify student services required on Costa Mesa Campus based on nature of students and program offered.

Action	Metric	Target	Lead	Status	Completed Activities
<i>Assess student service requirements for Costa Mesa students and programs</i>	Undertake a needs assessment at the Costa Mesa campus. Timeline: Deferred	Student Services at both campuses will be similar and responsive to student and program needs	Director of Student Services, Director of Global College	Deferred until COVID- 19 pandemic allows for the planning of face-to-face classes at Costa Mesa.	
<i>Ensure that both campuses fully conform to COVID- 19 university operating requirements</i>	Provide clear communication on all necessary protocols with monitoring processes in place. Faculty, staff and students are satisfied with return to class preparations. Timeline: TBA pending announced date of return to campus and latest protocols	Campuses are opened and fully compliant.	COS/Directors of Student Services/Global College	In Progress: Planning and Preparation for return to classes.	<ul style="list-style-type: none"> • Covid-19 hub was created in March 2020 to provide relevant updates to international students. • Monthly online contemplative activity was designed and organized to help students’ self-care and cope with COVID-19 pandemic. Eight events were organized from March 2020 to November 2020 with 30 attendants.