

**Memorandum**

October 18, 2012

**Date:** October 18, 2012

**To:** *Student Value and Affordability Working Group Members:*

Wayne Sigler, Chair	Jana Hurley
Gil Brown	Wendi Manuel-Scott
Tom Calhoun	Steven Mullins
Sharon Caraballo	Steven Pearlstein
Veronica Ramos-Coreas	Nancy Pfothenhauer
Ed Douthett	Alison Price
Cody Edwards	Steven Scott
Heidi Granger	Martha Westcoat-Andes

**From:** President Ángel Cabrera and Professor Sarah Nutter, Presidential Fellow

**Subject:** Your Working Group’s Charge for Strategic Visioning Process

---

Thank you for agreeing to join this important Working Group to help shape the ideas and priorities for our new strategic Vision and to position the University for the future. Your work will be instrumental in crafting our new Vision and will also provide important input to the strategic planning process that we will embark on next year.

**The Context for Your Work**

As you know, we have embarked on this strategic visioning process to clarify who we are and guide our future. Our new Vision will include a concise and memorable mission statement, a set of values describing the “The Mason Way” of doing things, a profile of the attributes we wish all of our graduates to share (“The Mason Graduate”), as well as a set of our shared commitments for the next decade. This new Vision and the supporting materials we develop through this process will be the foundation for our next strategic plan and our new comprehensive capital campaign. We will present the Vision document to the board in March 2013 for their approval and immediately thereafter begin the strategic planning process. This is an exciting time for the University and a great opportunity to get all of our constituents united behind a powerful and distinctive Vision for Mason.

The Student Value and Affordability Working Group will be responsible for a critical component of this strategic visioning work—*analyzing cost trends in higher education and the drivers behind those trends, analyzing Mason’s current tuition policy, and value for and returns on investment for our students*. In your analysis, you will consider key issues facing higher education at large and Mason in particular and assess Mason’s competitive advantage in this area. Ultimately, we will ask you to draft a report summarizing your work and suggesting possible Mason commitments in this important area. The materials we send to the board will synthesize the

output from all the Working Groups and may use all or parts of your proposed commitments, making it integral to the Vision document and the strategy work itself.

### **The Structure of the Work**

Your group, chaired by Wayne Sigler, VP of Enrollment, is expected to meet regularly through the end of the semester to accomplish its tasks and draft your report. You will be asked to consider the following questions as part of this topic:

1. What are the broader trends for the costs of higher education for students we need to consider? What are the principal drivers of these cost trends? How will these trends impact our student population, including the demographic of undergraduate and graduates students that we serve?
2. What costs does Mason incur to educate a student? And, what are the sources of funding to cover those educational costs? What can we do to more effectively manage our resources?
3. What are current trends in financial aid and what should be our commitment for academically prepared deserving students?
4. What is the existing capacity of our facilities? What might be done to utilize them more efficiently?
5. What factors do students and their families value in making an investment in education?
6. What are other universities doing to address trends in terms of tuition policy and other levers we can control? What should we be doing about these trends?
7. How can we measure the returns to students from their investment in education and how does Mason compare to other Virginia universities?
8. What is Mason financial aid policy for undergraduates and for graduate student? What should it be to help achieve Mason's goals to support the enrollment of academically prepared, financially challenged prospective students and having sufficient revenue to enable Mason to fulfill its mission?

The group will work to gather input from a variety of sources—external and internal data sources, and from the community at large—faculty, staff, students, and alumni -- to answer these questions, determine Mason's competitive advantage, and suggest possible commitment(s). Some of the ways you should consider gathering data from the community include:

- Review of relevant internal and external data and reports
- Focus groups with faculty, staff, and students
- Interviews with key individuals inside and outside the university
- Discussions at departmental, school, faculty and student governance meetings
- A “town hall” meeting with specific constituent groups to get input on these questions
- Online discussions

You will be supported in your work by our Project Manager, Carrie Klein (email: [cklein7@gmu.edu](mailto:cklein7@gmu.edu), phone: 703-993-5399).

## **Timeline**

The Steering Committee will collect all the Working Group inputs before the start of the spring semester, then work to incorporate them into our Vision document. These will be shared back out with the community in February for additional input and reactions, then revised and prepared for the board. We recommend that you think of your work in terms of five brief phases:

1. Clarifying the questions you need to answer
2. Gathering internal and external data and reports
3. Reaching out to engage the community on this issue
4. Consolidating your inputs
5. Drafting your final report and proposed commitment(s)

We want to thank you in advance for your work and for taking on this responsibility on top of an already busy semester. We know that your engagement with the topic and your outreach to the community will be of immense value for the task we have at hand.

## **Format and Outline for your report**

The format of your report will include a 1-page executive summary, which will highlight the key insights from your analysis, the Mason competitive advantage in your area, and proposed Mason commitment(s). The remainder of the report will provide supporting description and analysis related to each key issue, including a discussion of potential trade-offs and/or critical success factors involved in the pursuit of your proposed commitments. In addition, you are welcome to briefly raise any issues that were not addressed or do not have the same immediacy as your key issues but should not be overlooked in the strategic planning process.

The report should not exceed 20 pages, excluding appendices. Please format your document to be single-spaced, with double-space between paragraphs, 12-point Times New Roman font, 1-inch margins, and a footer that indicates your Working Group and page number.

Please use the following outline for your report:

- 1) Executive Summary—including key insights, Mason’s competitive advantage, and proposed commitments.
- 2) Key Issues – for each issue identified
  - a) Issue XX
    - i) Issue analysis that includes a brief description of the key issue facing higher education at large and Mason in particular

- ii) Mason's competitive advantage in this area
  - iii) Trade-offs and/or Critical Success Factors
  - iv) Proposed commitment - a broad statement that describes what Mason could achieve in this area.
- 3) Additional issues to consider going forward that are beyond scope of this vision process
  - 4) References
  - 5) Appendices

**Working Group Email Addresses**

Wayne Sigler <a href="mailto:wsigler@gmu.edu">wsigler@gmu.edu</a>	Jana Hurley <a href="mailto:jhurley4@gmu.edu">jhurley4@gmu.edu</a>
Gil Brown <a href="mailto:gbrowne@gmu.edu">gbrowne@gmu.edu</a>	Wendi Manuel-Scott <a href="mailto:wmanuels@gmu.edu">wmanuels@gmu.edu</a>
Tom Calhoun <a href="mailto:tcalthou2@gmu.edu">tcalthou2@gmu.edu</a>	Steven Mullins
Sharon Caraballo <a href="mailto:scarabal@gmu.edu">scarabal@gmu.edu</a>	Steven Pearlstein <a href="mailto:spearls2@gmu.edu">spearls2@gmu.edu</a>
Veronica Coreas-Ramos <a href="mailto:vramosco@masonlive.gmu.edu">vramosco@masonlive.gmu.edu</a>	Nancy Pfothhauer
Ed Douthett <a href="mailto:edouthet@gmu.edu">edouthet@gmu.edu</a>	Alison Price <a href="mailto:aprice1@gmu.edu">aprice1@gmu.edu</a>
Cody Edwards <a href="mailto:cedward7@gmu.edu">cedward7@gmu.edu</a>	Steven Scott <a href="mailto:shscott15@gmail.com">shscott15@gmail.com</a> <a href="mailto:sscott4@masonlive.gmu.edu">sscott4@masonlive.gmu.edu</a>
Heidi Granger <a href="mailto:hgranger@gmu.edu">hgranger@gmu.edu</a>	Martha Westcoat-Andes <a href="mailto:mwescoat@gmu.edu">mwescoat@gmu.edu</a>