

An aerial photograph of the University of the South campus, showing various buildings, green lawns, and a large river in the background. The text is overlaid on the center of the image.

ONE Shepherd:

One Mission. One Vision. One Voice

President's Report

Fall Assembly
September 8, 2025

Presentation Outline

- Dr. Mary J.C. Hendrix, *President*
 - Progress on 2024-2025 Goals and New Academic Year Goals for 2025-2026
- Dr. Scott Barton, *Vice President for Finance and Administration*
 - Financial Update
 - Business Intelligence Tools Update
 - Status of Deferred Maintenance Projects
 - Dining Hall / Multipurpose Building Update
- Dr. Jack DeRochi, *Provost and Vice President for Academic Affairs*
 - Fall 2025 Enrollment Update
 - Academic Affairs Updates
- Dr. Kelly Hart, *Vice President for Development and Annual Giving*
- Noteworthy Highlights
 - Great Colleges to Work for Committee Initiatives
 - Agribusiness Building
 - Grant Portfolio
 - West Virginia First Foundation



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Goals for 2025-2026



www.shepherd.edu/goals

The Employee Experience

2024-2025 Goal Progress

- ✓ The Employee Salary Review Team completed a comprehensive review with recommendations for achieving 100% of CUPA (College and University Professional Association for Human Resources) median and annual cost of living increases.
- ✓ An Implementation Team reviewed the data and created a model for distributing funds based on a percentage of net revenue. This plan will be presented at the Board of Governors meeting on September 11, 2025.

2025-2026 Goals

- Develop and launch employee intranet/portal.
- Implement morale-boosting suggestions from Great Colleges to Work For Committee.
- Adjust salaries per CUPA recommendations.
- Host a comprehensive Professional Development Day for all staff.



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The Student Experience

2024-2025 Goal Progress

- ✓ Residential hall assessment complete and upgrades in progress:
 - ✓ Spring/Summer 2025:
 - ✓ Yost - Stairwell replacement
 - ✓ Dunlop - 1st-floor carpeting
 - ✓ Potomac Place - Mattresses replaced and key HVAC upgrades
 - ✓ West Woods, Shaw, Thacher, Printz, and Dunlop - New window screens
 - ✓ West Woods, Printz, Dunlop - Pressure washing
 - ✓ Miller Hall - General cleaning
- Enrollment targets met or exceeded: 504 Freshmen, 255 Transfers, 282 Dual Enrollment, 39 RBA.
- Retention rate goal (increase from 72% to 73%) - *data pending*.
- On-campus residency goal (increase from 33% to 36%) - *data pending*.
- Strategic plan for student-athlete experience submitted.

The Student Experience (cont.)

2025-2026 Goals

- Expand scholarships through donor engagement.
- Develop detailed plan to continue utilizing \$2.5M in state funding for residence hall renovations.



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The Academic Mission

2024-2025 Goal Progress

- ✓ Completed AV and tech upgrades in 14 classrooms; Hyflex rooms added
- ✓ Upgrade faculty/staff computers and establish schedule for replacement.
 - ✓ 37 new devices delivered to faculty and staff.
- ✓ Initial draft of faculty workload policy completed; consultation with Faculty Senate underway. The next draft will be completed this Fall.
- ✓ Online program expansion plan developed; “Shepherd Online” initiative, expanding over two years with necessary operational infrastructure and instructional design support. Continue to pursue external partnerships to support the initiative and recruit student cohorts.

2025-2026 Goals

- Improve academic branding.
- Launch Shepherd Online by January 15, 2026.
- Develop new academic organizational structure by March 1, 2026.
- Finalize faculty workload policy and college-specific metrics by May 1, 2026.
- Create 3-year enrollment plan by October 2025.



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The Administrative Operations

2024-2025 Goal Progress

- ✓ KPIs developed for all units.
- ✓ MOU with Foundation finalized; Vice President for Development recruited.
- ✓ Administrative Prioritization complete; strategic implementation underway to deter redundant operations and maximize efficiencies.
- ✓ Key searches completed (Provost and Civil War Center Director).
- ✓ Financial systems synchronized; dashboard targets met.
 - ✓ Information between Banner and PeopleAdmin synchronized to validate data shared in the financial dashboard.
 - ✓ Target of more than 50 days cash with 30-35 days unrestricted.
- ✓ Website redesign on hold; form/workflow development underway.
- ✓ Expand public/private partnership opportunities, leveraging prospects through the Shepherd Entrepreneurship and Research Corporation (SERC).
- ✓ Increase extramural funding by 10% (from a base of \$7.5 million) to advance major projects across campus.
 - ✓ \$15 million secured (100% increase)



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The Administrative Operations (cont.)

2025-2026 Goals

- Support Vice President for Development with donor prospecting and stewardship plans.
- Complete dining hall/multipurpose building by Fall 2026.
- Finish \$14M deferred maintenance projects.
- Close out East Campus grants.
- Improve contract management processes.



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Year Goals for 2025-2026



www.shepherd.edu/goals



Finance Division

- Financial Update
- Business Intelligence Tools Update
- Status of Deferred Maintenance Projects
- Dining Hall / Multipurpose Building Update

Financial Update



Tuition and Fee Revenue

6/30/2024	\$26,347,729
6/30/2025	\$26,781,790
Increase of:	\$434,061

Salaries and Wages

6/30/2024	\$24,769,630
6/30/2025	\$23,810,471
Decrease of:	(\$959,159)

Cash (as of June 30, 2024)

Restricted	\$8,046,772
Unrestricted:	\$4,360,656
Total:	\$12,407,428

Days of Cash (as of June 30, 2024)

Total Cash:	92 days
Unrestricted:	32 days

Cash (as of June 30, 2025)

Restricted	\$38,228,977
Unrestricted:	\$5,098,685
Total:	\$43,327,662

Days of Cash (as of June 30, 2025)

Total Cash:	333 days
Unrestricted:	39 days

Financial Update (cont.)



<u>Operational Analysis</u>	2021	2022	2023	2024	2025 (Estimated)
	E&G	E&G	E&G	E&G	E&G
Tuition and Fees	25,676,566	24,377,089	25,430,509	26,347,729	26,781,290
Contracts and Grants	3,612,031	3,240,571	3,584,254	4,076,203	6,568,623
Interest on Student Loan Receivable	7,564	48,551	20,191	2,394	5,026
Sales and Services of Educational Departments	216	29,331	41,018	36,841	34,104
Auxiliary Enterprise Revenue	9,120,531	11,285,610	13,145,067	13,417,853	13,290,988
Scholarship Allowances	(11,008,917)	(10,568,958)	(12,106,037)	(12,627,890)	(15,472,343)
Other Operating Revenues	790,730	189,284	(96,896)	15,459	895,066
Total Operating Revenues	28,198,720	28,601,477	30,018,105	31,268,589	32,102,753
Salaries and Wages	24,399,757	24,072,002	24,265,067	23,415,666	22,497,497
Benefits (<i>Pending OPEB adj. 2025</i>)	3,372,581	2,619,583	2,641,597	3,548,993	4,671,220
Supplies and Other Services	9,228,706	10,484,590	10,663,049	10,818,935	11,396,791
Utilities	2,876,018	3,026,776	2,952,903	2,771,716	2,901,131
Scholarships and Fellowships	4,463,242	6,604,571	2,162,596	2,387,706	2,191,751
Depreciation	6,025,951	5,585,361	6,103,169	6,681,916	7,221,606
Total Operating Expenses	50,366,255	52,392,882	48,788,380	49,624,932	50,879,996
Operating Gain/(Loss)	(22,167,534)	(23,791,405)	(18,770,274)	(18,356,344)	(18,777,243)
State Appropriations	12,874,086	12,493,572	13,026,830	14,136,730	14,139,125
Federal Nonoperating Revenues	4,282,423	3,779,768	4,071,099	4,694,272	5,576,342
Total (Relevant) Non-Operating Revenues	17,156,509	16,273,340	17,097,929	18,831,002	19,715,467
Operational (Deficit)/Surplus	(5,011,026)	(7,518,066)	(1,672,345)	474,658	938,225

Business Intelligence Tools Update

Integration (June 2025 - December 2025)

- Rolling Out Monthly Reporting
- Variance Reporting
- Personnel Reporting
- Create Workflows for Internal Processes
- Closing
- Data Reporting
 - IPEDS
 - Grants
 - NCAA, etc.
- Training (throughout FY2026)
- Internal Administration
- Departmental Users



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Status of Deferred Maintenance Projects

Byrd Science Center

- Completed install of VAV controllers
- Hot water plant turned back on now since VAV controllers installed
- Completed labeling of piping/ductwork
- Getting ready for commissioning test and air balance for August 11
- All controls/valves are complete for all VAV boxes and radiators
- All ductwork/piping insulation complete
- Test and Air Balance scheduled to start August 11
- Final commissioning and punch list



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Status of Deferred Maintenance Projects (cont.)

Student Center

- All heat pumps are factory started and running
- Completed labeling of piping/ductwork
- Getting ready for commissioning test and air balance for August 11
- All ductwork insulation complete
- Test and Air Balance scheduled to start August 11
- Final commissioning and punch list



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Dining Hall/Multipurpose Building Update



Dining Hall Entrance

Dining Hall Exterior



Dining Hall/Multipurpose Building (cont.)



Dining Hall Interior

Dining Hall Interior



Dining Hall/Multipurpose Building (cont.)



Athletics Entrance

Athletics Lobby



Dining Hall/Multipurpose Building (cont.)



Exterior Rendering – Field View



Academic Affairs Division

- Fall 2025 Enrollment Update
- Academic Affairs Updates

Fall 2025 Enrollment Update

Report and Projection:

Fall 2025 Enrollment Report Projection					
8.27.25 Third Day of Add/Drop	8.22.2023	8.28.2024	8.27.2025		10.01.2024
Student Type	To-Date HC	Current HC	Current HC	YOY Variance	CENSUS
Continuing	1562	1580	1578	-2	1562
New Freshman	582	522	585	+63	504
Re-admit	37	23	23	0	22
Transfer	235	263	227	-36	255
Total UG Degree-Seeking	2416	2388	2413	+25	2343
Graduate - Continuing	99	88	94	+6	87
Graduate - New	69	74	62	-12	70
Total Degree-Seeking	2584	2550	2569	+19	2500
Non-degree UG	409	512	-	-	691
Non-degree GR	120	102	65	-37	150
Total Enrollment Degree & Non-degree	3113	3164	-	-	3341

- Projected increase of +10% New Freshmen
- Projected increase of +2% in Persistence Rate for Continuing Students
- Total Enrollment Projected to be flat to slightly up.



Enrollment Management and Academic Affairs: New Collaborations

- Revised Graduation Application Deadlines
- New Open House Activities
 - Revised Open House Schedule (**September 27** and **November 1**)
 - On-time Survey Engagement at Academic Presentations
 - Intentional “Call to Action”
- Sales/Enrollment Training Scheduled for October 28 and 29
- Increasing Community Engagement at Local High Schools



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Academic Affairs Transformation Process

Strategic Objective

To transform the Division of Academic Affairs organizationally in order to be innovative and future-focused, thus expanding Shepherd University’s impact on our students, community, and region.



Process and Timeline	
Surveys	July 9 - September 8
Faculty Conference	September 22
Focus Groups	September 22 - October 17
ALC Research on Models and Best Practices (Lightcast Data as Needed)	September - October
Administrative Workshops	October 29 - November 12

Strategic Retention Objectives

Strategic Project	Project Lead
Develop a comprehensive and integrated advising enterprise.	Amy DeWitt
Develop an annual integrated communications plan for promoting advising, increasing student registrations, and enhancing student support.	Will Bell
Launch and establish ongoing student focus groups to gather actionable insights on student needs and experiences.	Jack DeRochi
Increase experiential learning opportunities and participation for first-and second-year students.	Ben Martz
Develop and launch best-practice pedagogical framework for early-term student engagement and academic support.	Richie Stevens
Review and facilitate curricular streamlining across our academic portfolio.	Kurtis Adams



Launch of “Shepherd Online”

- Comprehensive Assessment of Shepherd Online Education
- Online Implementation Committee
 - Institutional Operations (Financial Aid, Billing, Registration, IT, Etc.)
- Online Academic Quality Committee
 - Online Programs and Instructional Design
 - Academic Policies for Online Learning



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Development and Annual Giving

- 2025-2026 Plan and Important Dates



Development and Annual Giving Plan 2025-2026

Goals

- Increase Annual Giving by 3-5%
- Increase Alumni Giving by 1-3%
- Increase Day of Giving Donors by 50
- Increase President's Club Members by 25
- Increase Donor Retention by 5%
- Secure Corporate Sponsors for Shepherd Initiatives

Important Dates

- Giving Tuesday - December 2, 2025
- Day of Giving - March 4, 2026



Noteworthy Highlights

- Great Colleges to Work for Committee Initiatives
- Agribusiness Building
- Grant Portfolio
- West Virginia First Foundation



Great College to Work for Committee

- Committee members representing Faculty and Staff voices were selected to address employee-related issues, including morale and our campus environment as a place of employment.
- We reviewed the 2024 results of the Great Colleges to Work for Survey, together with input from a new initiative, called Faculty Voice.
- Our goal is to generate consensus-driven recommendations to improve: job satisfaction and support; professional development; faculty and staff well-being; communication; collaboration; and confidence in senior leadership.

Committee Members

Chair, President Hendrix

Dr. Scott Barton

Dr. Larry Daily

Dr. Jack DeRochi

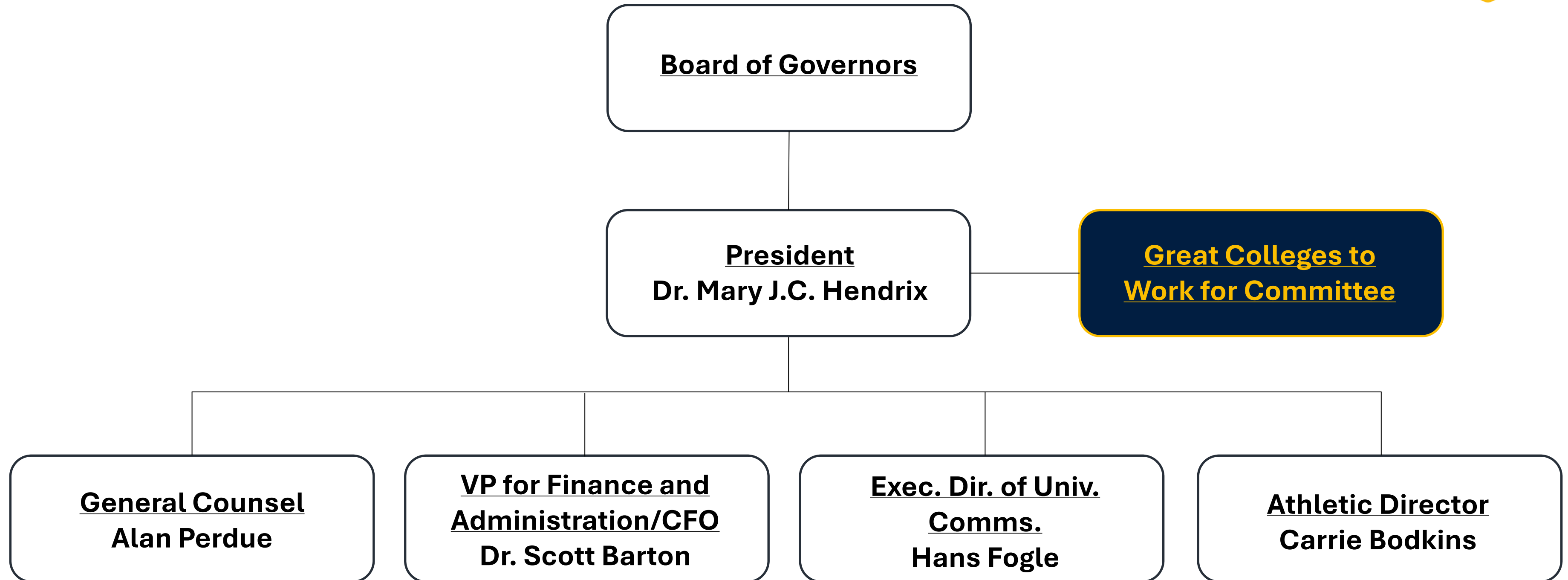
Tammy Gill

Dr. Heidi Hanrahan

Barbara Kandalis

Danielle Stephenson

Dr. Richard Stevens



Great College to Work for Committee (cont.)

Welcome and Campus Updates

- **Welcome Luncheon:** We came together to enjoy a Welcome-to-a-New-Academic-Year Luncheon on August 21. Drs. Hendrix and DeRochi introduced new employees and celebrated the start of the year.
- **Campus Communications:** On August 15, Academic Affairs started sending its weekly updates about ongoing and new initiatives. I will also share monthly summaries of key agenda items from the Executive Leadership Team (ELT).
- **Instructional Spaces:** We will have a systematic focus on classroom and other learning spaces around campus with the goal of enhancing the daily experience of our faculty and students with respect to the learning environment.
- **Operational Functions:** We are conducting a systematic review of the University's current systems, policies, and processes to reduce unnecessary friction and streamline our procedures.

Next Meeting is September 9!



Great College to Work for Committee (cont.)

Faculty and Staff Engagement

We're excited to offer new and ongoing opportunities for faculty and staff to connect with one another and enjoy campus life:

- **Family Days at Athletic Events:** We want faculty and staff to bring their families and enjoy quality time on campus. As a reminder, faculty and staff enjoy free admission to home football games for themselves and one guest with a Rambler card, plus free access to other regular-season sporting events.
- **Birthday Month Meals:** Starting in August, employees can enjoy a complimentary meal at the Rams Den during their birthday month. Summer birthdays (May-July) can redeem theirs in August.
- **First Friday Lunches and Discounts:** Discounted lunches are available every Friday at the Rams Den. Campus leaders will join on the first Friday of each month—stop by to share your thoughts or just say hello. Additional employee discounts are available at www.shepherd.edu/discounts.
- **Movie Night at The Opera House:** Join us on October 18 for a fun evening with complimentary snacks and great company.



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Great College to Work for Committee (cont.)

Campus Spirit

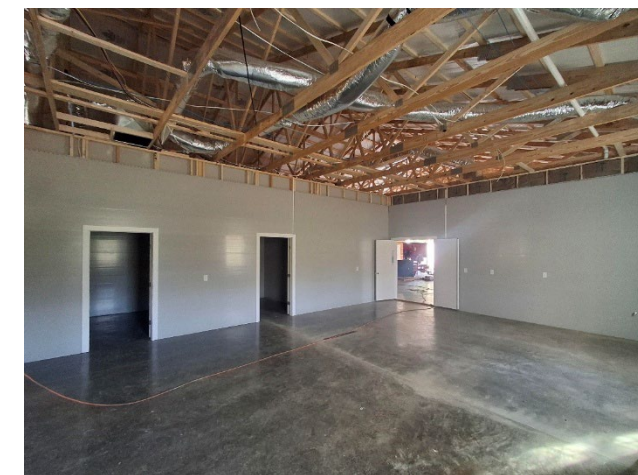
Let's celebrate our Ram pride and build community together as part of our ONEShepherd theme this year:

- **Blue and Gold Fridays:** Wear your Shepherd gear to work each Friday to show your Ram spirit.
- **Homecoming Decorations:** A designated team is working with downtown vendors to decorate storefronts in celebration of Homecoming.



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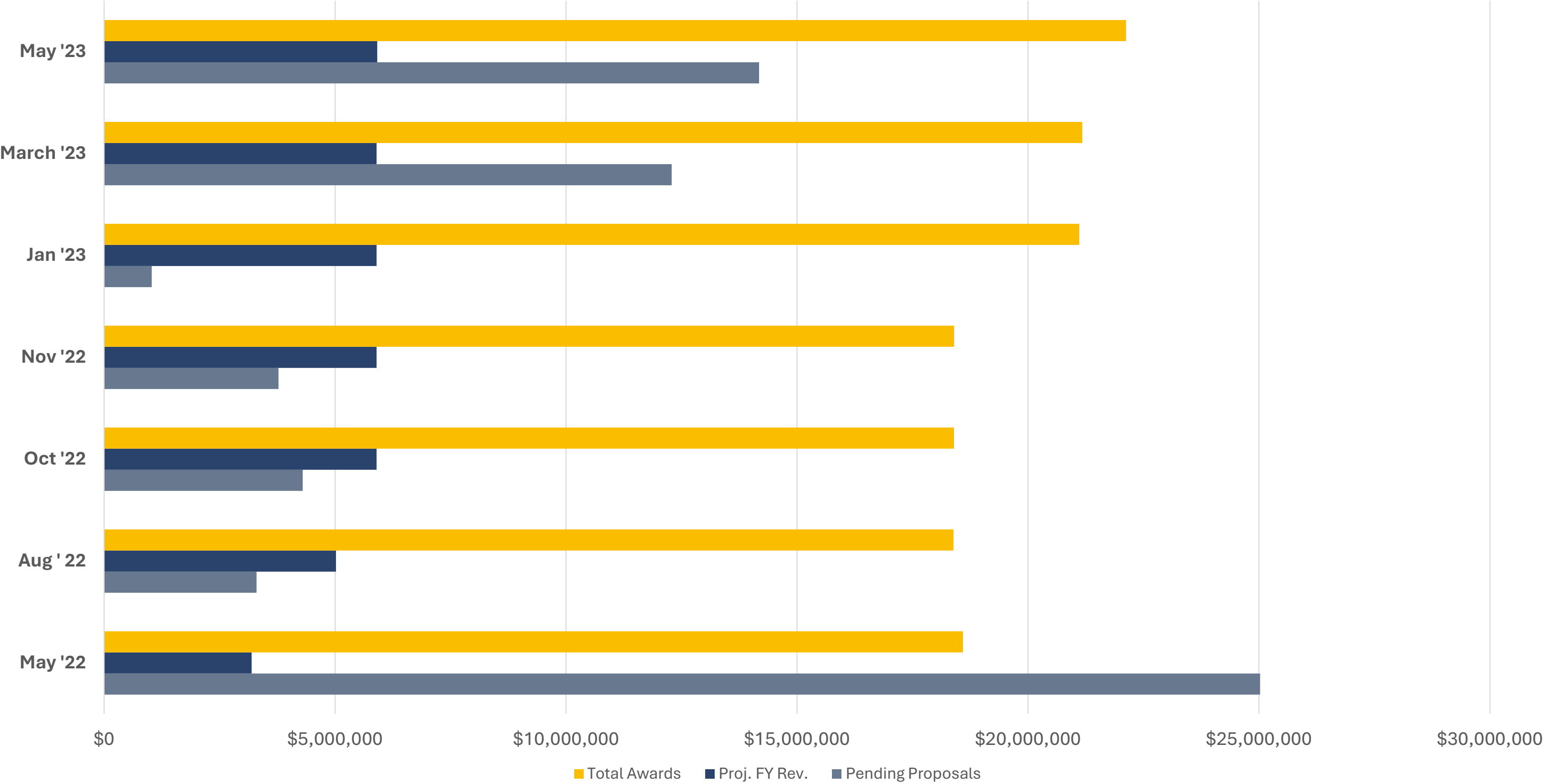
Agribusiness Building



Grants Portfolio FY2023-2025

Portfolio Activity FY'23

Grants Growth Snapshot



FY'23 Grant Highlight

R1 Track-1: West Virginia Network for Functional Neuroscience and Transcriptomics - Principal Investigators Dr. Conor Sipe and Dr. Qing Wang - \$945,458

Five years of pass through NSF funding to HEPC creates opportunities for undergraduate students to conduct neuroscience research, while partnering with local industries for career development and creating a “Brain Camp” for high school juniors interested in learning about neuroscience.

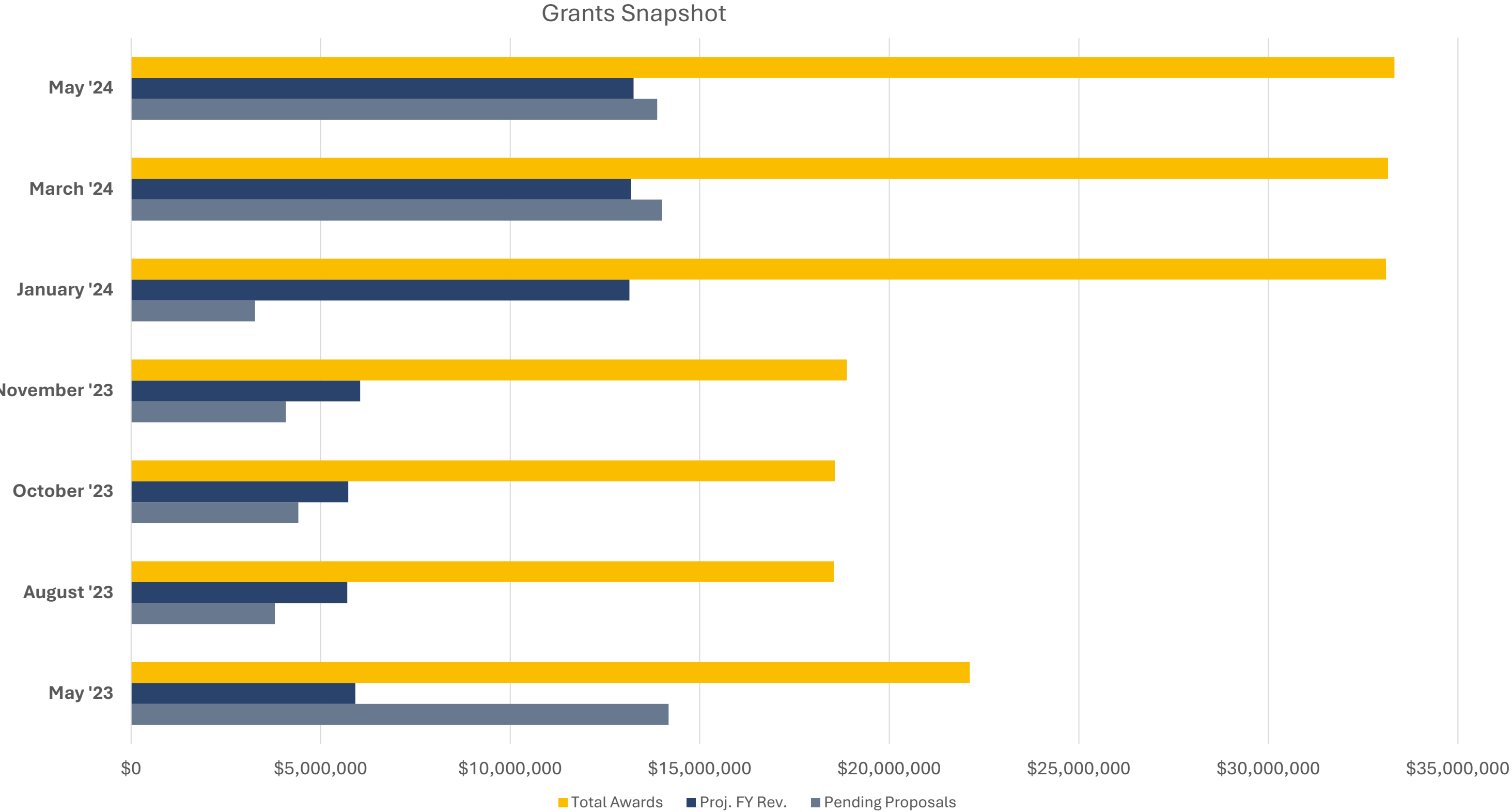


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Grants Portfolio FY2023-2025 (cont.)

Portfolio Activity FY'24



FY'24 Grant Highlight

WV REACH: Redesigning APRN Education - Project Director Dr. Kelly Watson-Huffer - \$2,599,992

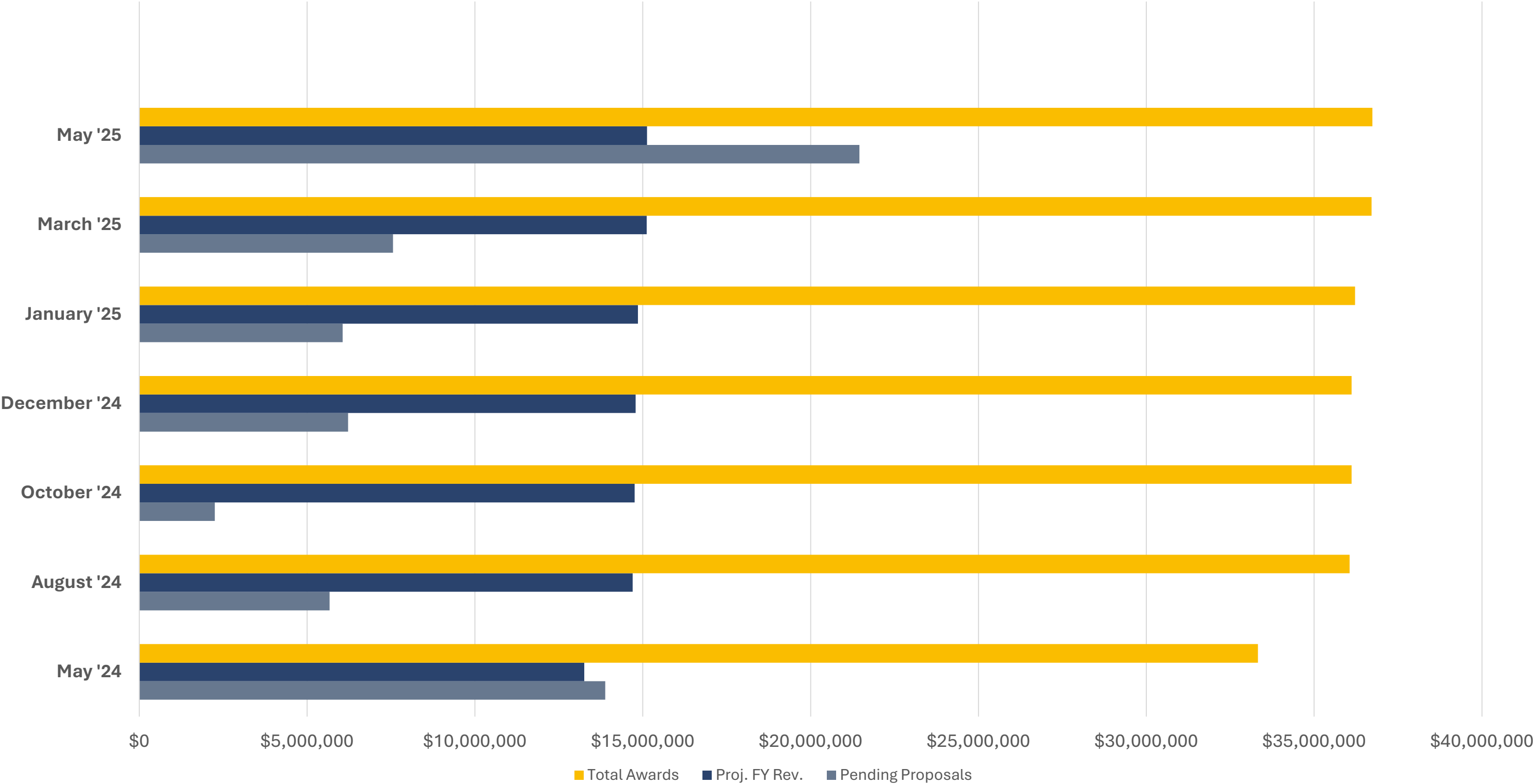
Four years of funding provides up to 26 scholarships and stipends per year for Doctor of Nursing Practice students as well as faculty stipends, and professional development activities to enhance the educational offerings and support the regional clinical training partnerships.



Grants Portfolio FY2023-2025 (cont.)

Portfolio Activity FY'25

Grants Snapshot



FY'25 Grant Highlight

Shepherd University Interdisciplinary Media Hub - Project Director Dr. Kurtis Adams - \$500,000

Four years of funding will develop existing campus programs, including music, theater, communications, design programs, journalism, and sports communications, to help Shepherd students build not only their demonstrable skills within their academic concentration but also facilitate interdisciplinary and multimedia projects for their tangible work portfolios.



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Other Grant Highlights

Recurring Funding

- US Department of Education TRIO Student Support Services (SSS) renewed for a 5th round of funding at Shepherd, led by Dr. Evora Baker.
- West Virginia Space Grant Consortium renewed, managed by Dr. Court Campany with support from Dr. Bob Warburton, Lori Moy and the Seeding Your Future Team, led by Dr. Sytil Murphy.
- WV Higher Education Policy Commission (HEPC) Nursing Program Expansion managed by Dr. Laureen Donovan for a third round of funding.

New Grant Seekers

- Dr. Jason Allen with support from Dr. Ben Bankhurst, Library of Congress Teaching with Primary Sources: “Almost Heaven: A Collection of Primary Sources to Teach WV History.”
- Dr. Zahra Pourabedin and Dr. Jim Dovel, USDA Rural Business Development Grant “An Examination of the Use of Agritourism by Farms in West Virginia.”



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Thank You!

Shepherd University is grateful to all the staff and faculty who have pursued grants at Shepherd, and the Shepherd community that makes grant work possible...

- SUITS
- Procurement
- Human Resources
- Student Employment
- Finance and Administration
- Our dedicated and patient administrative assistants and associates
- Academic Affairs
- Financial Aid
- Institutional Research
- Facilities Management
- Admissions and Enrollment
- Dual Enrollment
- Our students

A special thank you goes to our Office of Sponsored Programs, especially our Director, Emily Samide, and our Pre/ Post-Award Specialist, Erin Hildreth.

West Virginia First Foundation

September 18, 2025, at the Shepherd University Wellness Center.

About West Virginia First

- Oversees opioid settlement disbursements (\$1 billion statewide);
- 15 members of the Board (political, medical, legal, business, and recovery leaders); and
- Typically visit funded sites — Shepherd is among the first to receive a site visit to audition.

Shepherd's Presentation

- **Opioid Research Experience Using Photobiomodulation (PBM)**
 - Published pilot study for Jefferson County; second cohort completed in Martinsburg.
 - Seeking to expand clinical trials -- testing additional variables and devices.
- **Wraparound Recovery Care**
 - Sponsorship-based exercise + PBM program for post-rehab individuals.
 - Provides structure, accountability, and holistic support to reduce relapse risk.



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West Virginia First Foundation (cont.)

Our Presentation Team:

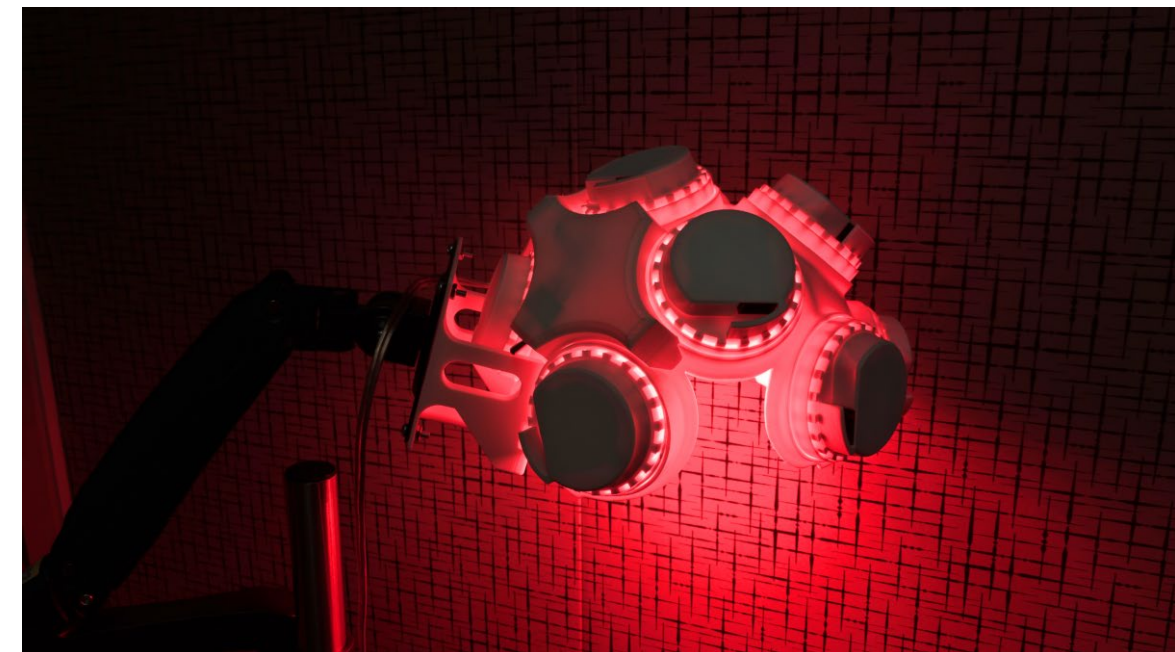
Mary Hendrix, PhD
President of Shepherd University,
Professor of Biology

Kelly Watson Huffer, PhD, DNP,
CRNP, CNE
Coordinator DNP Program; Project Director,
HRSA WV-Reach Grant

Jennifer Flora, DEL, MBA, MA, EP-C
Director, Center of Excellence for
Photobiomodulation

Why It Matters

1. Opportunity to position Shepherd University as a statewide leader in opioid recovery innovation
2. Aligns with West Virginia First's mission to fund impactful, evidence-based solutions



ONEShepherd: One Mission. One Vision. One Voice.

Thank you for your hard work, commitment to excellence and student success, and for your belief in a better tomorrow by working together!



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